

ERP for the Next Generation of Commerce





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EDITOR'S NOTE

Enterprise commerce is entering a new era—one defined by composable architectures, omnichannel experiences, and intelligent automation. As customer expectations continue to evolve and digital business models become more complex, organizations are rethinking the role of ERP. No longer confined to the back office, today's ERP platforms are becoming the connected foundation that links commerce, finance, supply chains, operations, and AI-driven decision-making.

This issue of ERPNews Magazine explores how businesses are building that foundation. From modern ERP migration strategies and cloud transformation to AI-powered financial intelligence, governance, and real-time operational visibility, our contributors examine the technologies enabling organizations to respond faster, operate smarter, and compete more effectively in an increasingly connected marketplace.

We're delighted to feature four executive conversations that reflect these themes from different industry perspectives. Natalie Hammond, Head of Propositions Marketing at Access Construction, explains how Access Coins Evo is helping specialty contractors unify field operations and finance, providing the real-time visibility needed to improve project performance and profitability. At Gray Matter Logic, Greg Mader, President, shares his insights into ERP modernization, composable technology strategies, and building flexible digital foundations that can evolve alongside the business. Chris Cappelli, Executive Vice President at Gray Matter Logic, discusses why successful AI adoption depends not only on technology but also on governance, accountability, and selecting partners that can support organizations throughout their transformation journey. We also speak with Guy Leibovitz, Co-Founder and CEO of Nominal, about why the future of AI in finance begins with trusted financial architecture, emphasizing that intelligent systems are only as effective as the quality and integrity of the data they rely on.

Across this edition, a common message emerges: technology alone is no longer the differentiator. Success increasingly depends on how effectively organizations connect systems, people, and data to create agile, intelligent enterprises that can adapt to continuous change. Whether the focus is commerce, manufacturing, construction, or finance, the next generation of ERP is about building connected platforms that deliver insight, resilience, and long-term business value.

As always, our goal is to bring together the ideas and voices shaping the future of enterprise technology. We hope this issue provides valuable insights and practical inspiration for your own digital transformation journey.



Pinar SENGUL, EDITOR

ERPNEWS

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Connecting the Field to Finance: Natalie Hammond of Access Construction on Real-Time ERP for Specialty Contractors

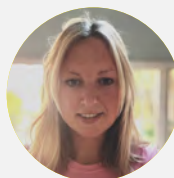
For many specialty contractors, operational complexity has outgrown the systems used to manage it. Project management, payroll, service operations, compliance, procurement, and finance often exist across disconnected applications, creating data silos that make it difficult to maintain visibility into project performance, labor costs, and profitability. As margins tighten and labor shortages persist, contractors are increasingly looking for technology platforms that can eliminate manual processes and provide a real-time view of business performance.

Access Construction launched Access Coins Evo to address these challenges by bringing field operations and financial management together within a single platform. Designed specifically for specialty contractors, the solution aims to connect project delivery, service operations, payroll, compliance, and accounting in real time, helping organizations identify issues earlier and make more informed decisions.

In this ERP News Q&A, Natalie Hammond, Head of Propositions Marketing at Access Construction, discusses the operational challenges facing specialty contractors, the growing importance of integrated ERP platforms, the role of AI in construction technology, and how real-time operational intelligence is reshaping the future of construction ERP.

Q: Access Coins Evo was launched around the idea of connecting field operations and finance in real time. What problem were you trying to solve for specialty contractors?

A: Specialty contractors were trapped between tools that were too basic and enterprise systems that were too complex and expensive. Their field, office, and financial systems didn't talk to each other, so the



Interview with
Natalie Hammond,
Head of Propositions Marketing,
Access Construction



same data was re-entered by hand across payroll, job costing, and accounting. The real damage showed up at month-end: a job cost overrun that happened mid-month wasn't discovered until the books closed 20 or more days later, by which point the margin was already gone and corrective action was impossible. Growth stalled because scaling meant hiring more administrative staff proportionally, just to manage the chaos.

We built Access Coins Evo to close that gap permanently. When a technician enters time on a job site, that single action flows automatically to payroll, allocates to job costs, and updates the project forecast; there is no re-entry and no reconciliation delay. Connecting the field to the balance sheet in real time is what eliminates the financial blind spots: contractors don't just see which jobs made money last month, they get early alerts on margin erosion while they can still do something about it. That's the difference between reporting a problem and preventing one.

Q: Many contractors still rely on disconnected systems for project management, payroll, field operations, and accounting. What operational challenges does this create, and why has the industry struggled to solve them?

A: Disconnected systems force manual coordination at every handoff. Data gets re-keyed between platforms, customer information lives in fragments, and decisions get made on numbers that are already days old. A contractor running service dispatch in one tool and construction in a separate

ERP literally can't see whether a customer is profitable across both relationships without someone manually consolidating spreadsheets. The result is duplicate entry, version conflicts, cash positions known three days late, and overruns caught only after they've destroyed the margin.

The industry has struggled because construction is one of the slowest sectors to adopt technology. It ranks lowest of ten major sectors for digital proficiency, and only around a quarter of contractors have access to real-time project data. Comprehensive ERPs did exist, but their pricing and implementation complexity put them out of reach for mid-market specialty contractors. That left most firms bolting point solutions together and paying an ongoing "integration tax" to keep them talking. These integrations routinely cost tens of thousands to build and as much again to maintain every year.

"Connecting the field to the balance sheet in real time eliminates financial blind spots. Contractors don't just see which jobs made money last month—they get early alerts on margin erosion while they can still do something about it."

Q: Access Coins Evo has been designed specifically for MEP, HVAC, civil, and specialty contractors. How do the requirements of these businesses differ from those of other ERP users?

A: For most MEP, HVAC, and specialty firms, these contractors effectively run two businesses at once, construction projects and field service, and service now represents 20 to 40 percent of revenue for most of them. That alone breaks generic ERPs, which treat service and construction as separate worlds requiring separate systems. On top of that, specialty contractors carry payroll complexity that few other industries face: union dues, prevailing wage, certified payroll for government work, Davis-Bacon compliance, and state-specific labor laws like California and Washington meal-break rules. Their crews are mobile, and their equipment needs to be costed to jobs as a live profit center, not tracked as a fixed asset on a back-office ledger.

Generic enterprise platforms like Oracle and SAP were adapted from manufacturing and need months of customization to approximate this, and they still lack the native depth. Access Coins Evo was engineered from the ground up around how electrical, mechanical, and plumbing contractors actually work, with 40-plus years of construction-specific expertise built in, so job costing, complex payroll, service-to-job accounting, and compliance are native capabilities rather than configurations. It's built for construction, not adapted to it.

“A single source of truth is becoming the baseline requirement, not a competitive luxury.”

Q: One of the key themes behind Access Coins Evo is eliminating manual data transfer between departments. How does this impact project visibility, job costing accuracy, and profitability?

A: Every manual handoff is a point where data goes stale or wrong. When field time, material purchases, equipment usage, and subcontractor invoices all post automatically to the right job as the transaction occurs, job costing stops being a month-end reconstruction and becomes a live picture. Bank reconciliation runs overnight at 96 percent automatic matching versus roughly 75 percent done manually, and a purchase order automatically updates commitments, adjusts the cash forecast, and triggers budget warnings if needed — one action ripples through the whole system with zero re-entry.

The profitability impact is direct because problems surface while they're still fixable. Predictive monitoring flags a job trending over budget weeks before month-end. One contractor caught three projects drifting and prevented around £50K in overruns by acting early. Across a typical portfolio, that early-intervention capability is worth an estimated \$600K to \$1M a year in losses avoided, because project managers can adjust crews, renegotiate materials, or raise a change order while there's still time, instead of explaining a blown margin after the fact.

Q: The platform combines project management, payroll, compliance, service dispatch, procurement, and finance within a single environment. Why is this level of integration becoming increasingly important for contractors today?

A: Three pressures are converging. Service revenue is growing fast; 60 to 70 percent of MEP contractors now perform service work, and the US MEP services market is projected to climb from about \$32.5B in 2025 to \$45.2B by 2030. Yet most firms can't see which customers are actually profitable when they do both project and service work for them. At the same time, cash flow is tightening, with subcontractors waiting an average of 56 days to get paid while owing suppliers in 30, and a chronic labor shortage means every contractor has to do more with fewer people. Automation isn't a nice-to-have anymore.

One platform integration is what unlocks all three. A single environment shows total customer profitability in one view, automates the field-to-

office work that would otherwise require more headcount, and removes the integration tax of stitching point solutions together. It also means decisions get made with complete, real-time data rather than from one department's slice of the data. For a contractor trying to protect margin and scale at the same time, a single source of truth is becoming the baseline requirement, not a competitive luxury.

Q: Construction firms are under growing pressure to manage labor costs, compliance requirements, and project margins simultaneously. How does Access Coins Evo help contractors gain better control over these areas?

A: On labor, mobile time capture flows straight into payroll with union rates and prevailing wage applied automatically, and the intelligent scheduling engine typically recovers 10 to 25 percent more billable hours from the existing workforce, which is worth roughly \$900K to \$3.75M in new annual revenue for every 100 technicians by turning non-productive drive time into billable work. On compliance, regulatory support is built into every bundle rather than sold as an add-on: California and Washington meal-break tracking, OSHA documentation, certified and prevailing-wage payroll, and segregation-of-duties monitoring that prevents an estimated \$50K to \$200K in penalties a year for a typical contractor.

On margin, real-time job costing and predictive alerts are the control mechanism. The system watches budgets 24/7 across every active job and flags developing overruns about

30 days early, while they're still cheap to fix. The common thread is that competitors typically charge separately for the compliance modules and analytics we include, and they report what already happened rather than warning you about what's developing. Control comes from seeing labor, compliance, and margin in one connected picture, in real time.

Q: Artificial intelligence is becoming a major focus across enterprise software. How are you approaching AI within Access Coins Evo, and where do you see the greatest value for contractors?

A: Our approach is construction-specific intelligence that's included in every bundle, not an upsell. That means a Feed with 50-plus pre-built alerts monitoring the business around the clock and role-specific Co-pilots for the Financial Controller, Project Manager, and Service Dispatcher with plain-English answers. A controller can ask, "What's our cash position?" and get an instant answer across all accounts instead of compiling it from eight banks by hand. Crucially, the AI learns your patterns, such as your vendors, your customers' payment timing, and your typical overrun signals, rather than applying generic industry averages, and it executes securely inside the platform with full audit trails, so there's no exporting data to an outside model.

The greatest value is prevention and time recovery. Catching a budget problem 30 days early while it's still controllable protects margin in a way that no after-the-fact report can. And automation like the "Perform Month End" command

compresses a five-day manual close into hours, freeing finance teams to do strategic analysis instead of chasing numbers. AI that understands construction turns the system from a record of what happened into an early-warning system for what's about to.

"ERP is moving from a system of record to a system of intelligence. The next generation won't just tell contractors what happened—it will tell them what's about to happen and help them act on it."

Q: Implementation timelines have historically been a concern for ERP projects in construction. How has your team approached deployment, and what are contractors expecting from ERP implementations today?

A: ERP in construction earned a reputation for 12-to-18-month deployments, and that history makes contractors understandably wary. We've approached it differently with a cloud-first architecture that supports an 8-to-12-week implementation. Just as important, growth doesn't mean re-implementing; a

contractor on Core can activate service management, CRM, or project modules as they move up to Professional without a migration. You turn capabilities on rather than ripping systems out.

Contractors today expect modern software speed: fast time to value, minimal setup, and the ability to scale without disruption. They've seen what cloud deployment looks like in the rest of their software stack and they expect the same from their ERP, being operational in months, not years. Lowering that barrier matters because the implementation risk, as much as the license cost, is what has kept so many specialty contractors stuck on legacy systems.

Q: The U.S. specialty contractor market remains highly fragmented, with many companies still operating on legacy systems. Why do you believe now is the right time for a new generation of construction ERP platforms?

A: The forces that kept contractors on legacy systems are now pushing them off. The construction ERP market is set to roughly double from about \$4.0B in 2025 to \$8.4B by 2035, with the broader construction tech market growing even faster, and that demand is being driven by real operational pain. The labor shortage is forcing automation, 59 percent of contractors cite the speed of technology adoption as a top concern, and 44 percent plan to increase AI investment. With US construction spending above \$2 trillion and margins staying tight, efficiency has become the thing that decides who wins work.

The timing is also about the gap in the market. Specialty contractors have been underserved, stuck choosing between affordable-but-limited accounting tools with bolted-on service modules or comprehensive enterprise systems that aren't configured for construction. A new generation of platforms can deliver true construction-grade depth with modern deployment speed, bundled with the tools specialty contractors actually need. That's the segment we're built for, and it's why 4 of the top 5 US ENR specialty contractors already run on Coins.



Q: Looking ahead, what is your vision for Access Coins Evo, and how do you see ERP evolving for specialty contractors over the next three to five years?

A: ERP is moving from a system of record to a system of intelligence. For the last few decades, these platforms told you what already happened; the next few years are about software that tells you what's about to happen and helps you act on it. Our vision for Access Coins Evo is exactly that: intelligence that monitors hundreds of projects at once, learns each contractor's specific patterns, and turns vast amounts of operational data into proactive, personalized action. The field-to-finance loop becomes fully closed and automatic, and service and

construction operate as one connected business rather than two.

We see the winning specialty contractors as the ones working smarter, not harder, by protecting margin through early detection, optimizing high-value service revenue, and scaling without adding administrative overhead. Our job is to keep building purpose-built tools for how these businesses actually operate, with continuous input from the industry, so the platform grows with a contractor from regional to national scale. The goal is simple: complete financial control, seamless operations, and automated compliance on one platform, getting more proactive every year.



AI, Operational Modeling, and the Future of ERP Transformation: A Conversation with Greg Mader and Chris Cappelli of Gray Matter Logic

Enterprise ERP projects are undergoing a significant shift. As artificial intelligence becomes embedded into enterprise software, organizations are rethinking not only how ERP systems are implemented, but also how operational knowledge is captured, modeled, and translated into long-term business value.

At the same time, enterprises are facing growing pressure to modernize without disrupting operations. The rise of AI copilots, intelligent automation, digital twins, and increasingly complex application ecosystems is challenging traditional assumptions about ERP transformation. For implementation partners, success is no longer defined solely by technical deployment, but by their ability to understand how businesses actually operate and to translate that understanding into scalable systems.

In this executive Q&A, Greg Mader, President of Gray Matter Logic, and Chris Cappelli, Executive Vice President, discuss the evolution of ERP implementation, the growing

importance of operational modeling, the role of AI in discovery and transformation projects, and why the future may belong to company-specific ERP strategies rather than one-size-fits-all industry templates.



Interview with
Greg Mader,
President,
Gray Matter Logic



Q: ERP implementation projects have historically been associated with long timelines, customization complexity, and operational risk. From your perspective, what is fundamentally changing in how enterprises approach ERP transformation today?

A: A few trends are moving at once, and together they've changed how we define what an ERP project is.

First, the ERP publishers are getting better. The software is more capable every year, and most platforms are now integrating some form of AI copilot meant to pull more value and more function out of the system you already own. That part is genuinely impressive.

Second, expectations about what even is an ERP in 2026. There's a live debate right now — does the ERP get stronger and absorb more, maybe as a composable stack of applications coming together, or does it narrow to the system of record for transactions while other applications, including AI systems, move to the front? I'll state my position on that at a later time. The point for now is that the question is open in a way it wasn't five years ago.

Third, the buyer got smarter. Users are more educated, they ask sharper questions, and they expect more. Nobody wants to sign up for an 18-month implementation anymore. The expectation now is real, measurable improvement in time to value.

Q: Gray Matter Logic emphasizes tailoring ERP systems around how organizations actually operate rather than forcing businesses into rigid workflows. Why does operational alignment remain so critical, particularly in industries like aerospace, manufacturing, electronics, and logistics?

A: Start with the thing too many people forget: an ERP exists to create efficiency, optimization, and visibility for the business, not the other way around.

There are vendors who walk into a company and say, "You need to change everything to fit the software." That ends in change-management pain, general dissatisfaction, and, worst of all, the business loses the small, specific things that actually gave it an edge.

It gets more acute in more regulated or traceable or specialized industries.

In manufacturing, the supply chain is built as much on relationships — on being able to call or text the right person — as on any formal sourcing policy. In electronics, you're working across time zones into Asia-Pacific and Europe to source the right materials. None of that survives if you flatten it to fit a default workflow.

So, the real question is how you use these systems to create alignment and get the best out of each other. The ERP should be a communication platform, not a control platform. The companies that understand that difference are the ones that keep their edge.

Q: Your "Implementation Blueprint" methodology introduces the concept of building a Knowledge Graph of a customer's operating model before implementation begins. Why is operational modeling becoming increasingly important in modern ERP projects?

A: Early in my career, a wise advisor named Clark Swinehart told me, "Greg, don't run ready-fire-aim projects." It stuck with me, really resonated. Because it's so easy to jump straight to a solution — to coding and development — without ever



confirming the thing actually fits what the project needs.

What we've built is the opposite of ready-fire-aim. We use a set of concepts to create a knowledge graph to map what an ERP could be in plain human language and turn it into a representation we call an "Implementation Blueprint," which is a different kind of digital twin. We build a complete model of the clients business and operations that we can represent however it's useful: drawings, diagrams, flowcharts. But underneath, we understand not just the mechanics of the business but the actual flows — how one part hands off to the next.

"The ERP should be a communication platform, not a control platform. The companies that understand that difference are the ones that keep their edge."

That's what lets us build an implementation that fits with precision and delivers better results. We offer faster time to value, but also something far more maintainable. The company can grow and evolve by adding to and changing the

knowledge graph instead of tearing things out. We built this approach by building on the experience of hundreds of customer engagements and the experience is what predictably lets us do it.

Q: The Peregrine platform appears to be designed to reduce the time needed to assess technical deficiencies and implementation requirements. How is AI changing the discovery, planning, and design phase of ERP implementations?

A: Our discovery doesn't start at kickoff. With our Peregrine AI, it starts during the first pre-sales conversations. We're already capturing the small moments: a concern raised in a meeting, a requirement buried in an email, a worry someone mentions in passing. A lot of what looks like office politics is really an unmet need, and you catch those far better when you capture them early.

We have a goal that nobody should ever have to repeat themselves. As requirements surface, we're refining and solving, not re-asking. Peregrine can agentically scan existing documents and system configurations, memos, diagrams, the million little notes people keep, so that when we do get in a room together, the whiteboarding and the face-to-face sessions are better formed.

I don't think we'll ever eliminate those in-person sessions, and we shouldn't. But we want to walk in already understanding the business, so the time we spend together goes to the hard problems instead of the basics. That's how we deliver a superior result.

Q: Many ERP vendors are heavily promoting AI copilots and automation layers today. In your view, where is the real value of AI inside ERP environments, and where is the industry still overhyping the technology?

A: It's the right move for the publishers to build AI into their systems. Frankly, without it, these systems get less and less relevant. And the internal, publisher-sponsored AI is genuinely useful for things like labor planning, production forecasting, and technician scheduling. But that's the beginning, not the destination.

Here's where the real value is, and it's the position I deferred on earlier. The goal is to actually build a common operating picture for the entire organization.

You will only get that when the ERP opens up and extends into the rest of the stack, through better connective tissue to Data Lake technology, PLM or Marketing Automation or other functionality, via MCP or other tools.

I remember a diagram from years ago laying out the enterprise software stack — ERP, but also PLM, CRM, e-commerce, and more. The integration between all of those stacks have always been, to some degree, a hassle. The companies with the means have always tried to assemble those pieces into something that runs like a single operating system for the business. With AI, that's more achievable than it's ever been.

So, the ERP probably stays as one component of a larger enterprise architecture and

need to connect better with other systems. The publishers who allow their systems to be managed and orchestrated as part of the bigger picture are building toward where CIOs and enterprises are actually going. That's the bet I'd make.

Q: As organizations become more dependent on interconnected systems, fragmented operational knowledge often becomes a major obstacle during transformation initiatives. How do you approach capturing institutional knowledge before implementation work begins?

A: We do a few things deliberately. The first you've already heard — Peregrine captures from notes, spreadsheets, conversations, and emails across the whole life of the project, even back into pre-sales, so we pick up the character of the organization from those early exchanges.

But we don't put human, face-to-face work in the backseat. We think it's essential to spend real time on site to walk the floor, take pictures, and ask people about their part of the process: where they're stuck, what would let them do better work, what would make the job more satisfying.

Those interviews touch on something some friends of ours named "high-tech anthropology," choosing to study how people actually use technology and work together. You have to understand those human elements to build something that genuinely solves the problem, instead of something that's technically correct and useless.

In our case, these elements of change management, adoption, alliances and frictions between departments goes into the knowledge graph. Because if you know where the friction is before you start, you can build a system that feels like it was made for people, instead of at them.

Q: There is growing pressure on enterprises to modernize ERP systems while maintaining operational continuity. What are the biggest mistakes organizations make when trying to balance innovation with business stability?

A: Let me start with the immediate red flag with a type of project that wrecks both innovation and stability at once: trying to do a migration inside an implementation. Customers will float the idea of jumping to the latest version or platform while they're still mid-implementation. This road ends in tears, every time.

With that out of the way, here's the part that sounds crazy.

Innovation matters more than operational continuity. I can point to companies large and small that chose stability over innovation again and again, and in the long run they got neither. They ended up behind and scrambling for change.

What actually matters is knowing your appetite for change and being willing to be more than a little uncomfortable — to operate, as a friend of mine puts it, at a healthy sweat. That's how you build and defend a real competitive advantage.

I'm not saying gamble with the fundamentals. Back office, accounting, HR- those stay

continuous and uninterrupted. But a certain amount of risk is the whole reason we do these projects. Be straight about it: there will be moments of discomfort while you build the system that's going to carry you for the next decade.

"We want to walk in already understanding the business, so the time we spend together goes to the hard problems instead of the basics."

Q: AI is increasingly being positioned as a way to accelerate ERP implementation and optimization. Where do you still believe human expertise, industry knowledge, and consulting experience remain irreplaceable?

A: AI is going to keep accelerating implementation and optimization.

This puts real pressure on the lower and middle tiers of my industry. The body-shop model is not the future of this profession. AI supercharges experienced people instead and lets them spend their time on real customer problems.

So where do humans stay irreplaceable? Experienced, educated people have always used new tools, and AI is no different.

We pride ourselves on being the best partner we can be, and a lot of that happens standing in a client's facility, eating lunch with their team, catching the one offhand comment about how something could be better. That sparks an optimization you'd never find in a requirements doc. Trust, collegiality, friendship, and treating ourselves as continuous learners is how we partner with AI and show up for our customers.

Q: ERP consulting itself appears to be evolving rapidly as AI becomes more embedded into enterprise transformation projects. How do you see the role of ERP implementation partners changing over the next few years?

A: Two things about this I find genuinely fascinating.

First: no kid grows up dreaming of becoming an ERP consultant. And yet it's one of the most rewarding professions I can think of. Most of us stumbled into it or heard about it from a friend. It's more craft than job. You learn from other people, from your customers, from reading, from the implementations themselves. A good chunk of our staff are former customers. They liked the work and our approach to it enough to make it their profession. I'm proud of that every time.

Second: this industry is aging out. The first generation of ERP consultants retired a few years back, and the second generation isn't far behind. So, we're working hard to bring in new blood, and we're proud of the relationships we've built with universities and with individuals all over the country.

The partners who win from here will invest in their people and also invest in AI tools and in the management practices that get the most out of people and tools together. It's not enough to say you have intense customer focus, even though we do. You have to understand how customer expectations are shifting and build deliberate learning into the work, for the humans and the AI both. That's the craft, updated for the moment we're in.

Q: Looking ahead, how do you expect AI-assisted operational modeling, intelligent automation, and industry-specific ERP strategies to reshape enterprise transformation projects across complex industries?

A: This might be the most important question our industry faces right now.

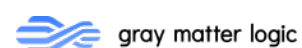
For years, industry-specific ERPs and accelerators were the mitigation strategy, a way to avoid over-customized, unmanageable, expensive systems. AI changes that formula. We're moving past industry-specific ERPs toward something better: company-specific ERPs. That's an enormously creative and fertile place to be standing right now.

Operational modeling has been around in many ways for decades; I remember the UML days of my youth. What we are seeing now is operationalizing digital twins into something that actually is the blueprint for the optimized implementation that works.

“The partners who win from here will invest in their people and also invest in AI tools.”

Intelligent automation, edge computing, real-time telemetry from every corner of an operation have existed in some form for years. What was missing was a way to manage it. Real-time data from across an enterprise used to overwhelm an ERP. AI doesn't just absorb it; it turns a flood of data into actual information products you can use.

Honestly, this is the most creative moment of my career. The chance to use these models, this automation, and this ability to tailor to a specific customer makes this a remarkable time to be part of this profession.



Guy Leibovitz, Co-Founder & CEO of Nominal, on How AI Agents Are Redefining Enterprise Finance

As finance organizations accelerate AI adoption, many are discovering that traditional automation and AI copilots still leave some of the most critical finance processes dependent on manual effort. While ERP systems have become the system of record for enterprise finance, activities such as reconciliations, intercompany accounting, variance analysis, and financial close often continue to rely on spreadsheets and human intervention. The next phase of enterprise AI is shifting the focus from assisting finance professionals to executing complex financial workflows with governance, auditability, and human oversight built in.

In this ERP News Executive Q&A, Guy Leibovitz, Co-Founder and CEO of Nominal, discusses why finance teams need more than AI copilots, how autonomous AI agents are reshaping financial operations, and why the future of ERP lies in an execution layer that works alongside existing enterprise systems. He also shares his perspective on continuous close, governance, and what will distinguish finance organizations that successfully scale with AI over the coming years.

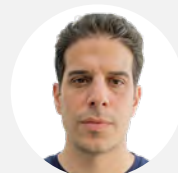
1. Why are finance teams still struggling with manual work despite significant investment in ERP systems, automation, and AI?

Because most of that investment went into recording and reporting, not execution. ERPs capture the data. Automation moves it from one screen to another. But the actual work, matching transactions, reconciling intercompany activity, explaining variances, still sits

with a person and a spreadsheet. You can buy every tool on the market and still close the books by hand if nothing is actually executing the workflow end to end.

2. What are the biggest limitations of today's AI copilots in finance environments?

Copilots answer questions. They don't do the work. Ask a copilot why intercompany is out of balance and it might tell you. It won't go fix it. That's the line between assistive AI and execution. A copilot speeds



Interview with
Guy Leibovitz,
CEO of Nominal



up a human's task. It doesn't remove the task. Finance teams don't need a faster way to look at the problem. They need the problem handled.

3. Many vendors are racing to launch AI agents and AI copilots. What should CFOs and finance leaders be looking for when evaluating whether these technologies can deliver real business value?

Ask one question: does this system execute a workflow on its own, start to finish, or does it just help a person execute it faster? Everyone calls everything "agentic" right now. The test is simple. Can it run a reconciliation, flag what needs a human, and close the loop without someone driving every step? If the answer is no, you're buying a better interface, not a new capability.

"The ERP stays the system of record. What changes is everything that happens on top of it. The execution layer is where the work actually gets done."

4. As companies grow across entities, geographies, and business units, complexity often scales faster than revenue. What are the biggest operational challenges multi-entity finance teams face today?

Every new entity multiplies the close. More intercompany transactions, more currencies, more local rules, more reconciliations that all have to land before consolidation can even start. Teams scale headcount to keep up, but headcount doesn't scale as fast as entity count. The work grows geometrically. The team grows linearly, if it grows at all.

5. Why has the concept of a continuous close remained elusive for so many organizations?

Because continuous close requires continuous execution, and most finance stacks are built for periodic execution. People run the close once a month because that's when someone sits down and does the matching, the reconciling, the reviewing. If the work only happens when a person does it, the close can only ever be as continuous as that person's calendar. Agents change that math. They don't wait for month-end to start working.

6. Which finance processes are genuinely ready for autonomous execution today, and which still require significant human judgment and oversight?

Bank reconciliation, intercompany matching, transaction classification, and flux explanation are ready now. These are high-volume, rules-

based, pattern-heavy processes. Judgment calls, policy decisions, anything with material risk or ambiguity, that stays with the controller or the CFO. The agents execute the workflow. The human owns the decision. That split doesn't move. Ten years from now, finance teams won't measure success by how quickly they close the books. They'll measure success by how little work is left to do at month-end. That's the shift AI makes possible.

7. How should finance leaders think about governance, auditability, and accountability when introducing AI into core financial operations?

Every action an agent takes needs a record. Not a summary, the actual decision trail: what it matched, why, against what rule, with what confidence. If you can't audit an agent's work the same way you'd audit a junior accountant's, it doesn't belong in your close. Human-in-the-loop isn't a nice-to-have. It's the only way autonomy and accountability coexist.

8. What role does organizational knowledge and historical context play in making AI effective inside finance teams?

It's the difference between an agent that executes correctly and one that executes confidently but wrong. Every company has its own exceptions, its own historical quirks in the chart of accounts, its own reasons a certain intercompany balance never quite nets to zero. An agent that doesn't carry that context will flag noise as signal constantly.

The ones that work are the ones trained on the company's actual financial history, not a generic model of what finance should look like.

9. ERP systems have long served as the system of record for enterprise operations and finance. As AI becomes more capable of analyzing information and executing tasks, how do you see the relationship between ERP platforms, finance systems, and AI evolving over the next few years?

The ERP stays the system of record. That doesn't change. What changes is everything that happens on top of it. Today most of that layer is manual or semi-automated. Over the next few years it becomes an execution layer, agents that read the ERP, run the close, reconcile across entities, and hand back clean books. NetSuite, SAP, Oracle, Workday, Sage, they hold the data. The execution layer is where the work actually gets done.

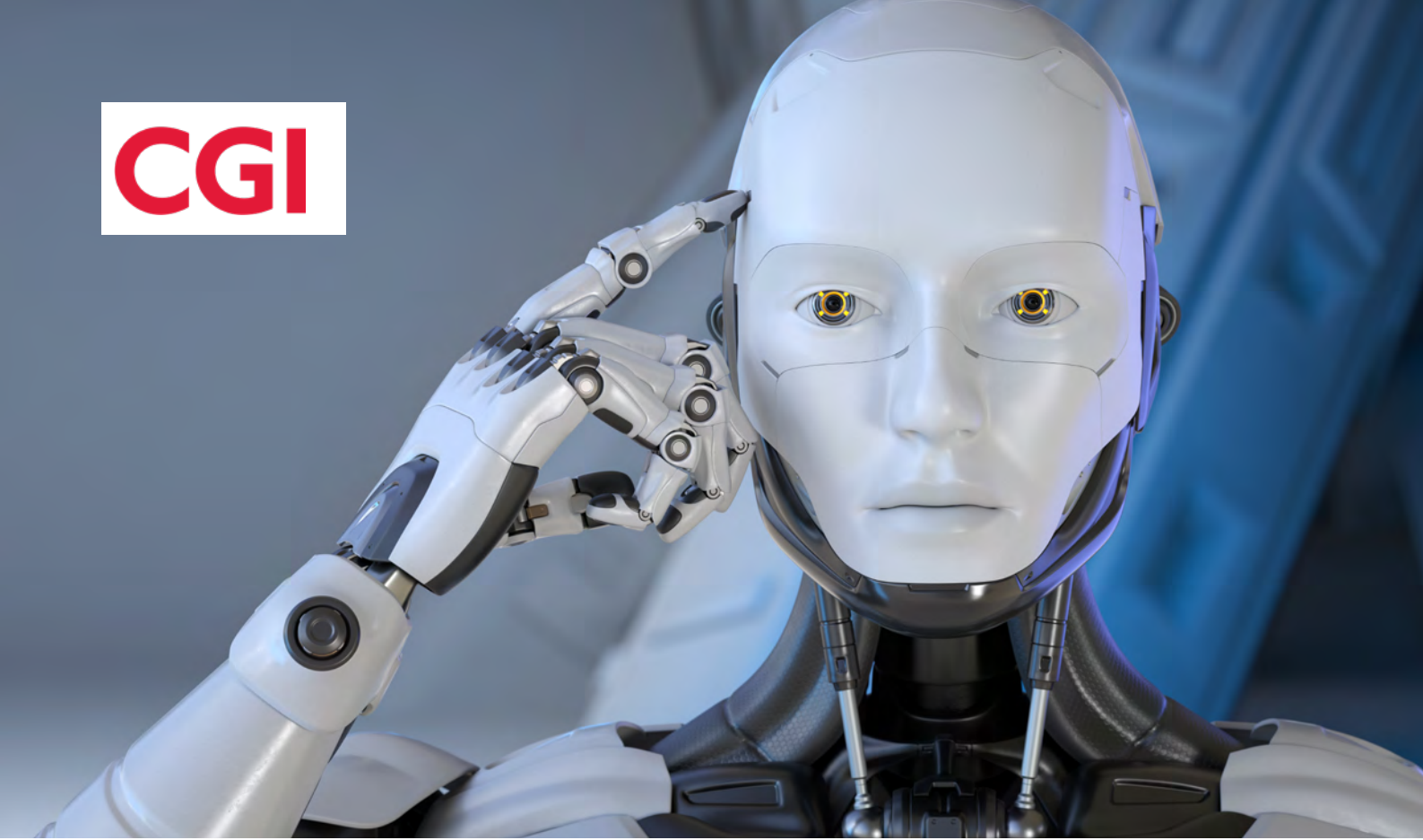
10. Looking ahead, what will distinguish the finance organizations that successfully scale with AI from those that simply automate existing inefficiencies?

The ones that scale are the ones that rebuilt the workflow around execution instead of bolting AI onto the process they already had. If you automate a broken process, you get a faster broken process. The teams that win are running their close, their reconciliations, their consolidations through agents that actually execute the work, with people reviewing outcomes instead of producing them. That's the real shift. Not faster automation. A different model entirely.

About Guy Leibovitz

Guy Leibovitz is the Co-Founder and CEO of Nominal, where he leads the charge in revolutionizing ERP systems through advanced Generative AI technologies. With over a decade of leadership experience, he has previously founded Cognigo, an AI data security startup successfully acquired by NetApp.





The AI token economy: Managing the hidden costs of agentic AI

Somewhere in your enterprise right now, an AI agent is quietly working. It's retrieving data, building context, reasoning through a problem and, when it reaches a dead end, trying another approach. Each of these invisible steps consumes tokens, and each of these tokens has a cost. Nobody can predict exactly what the final cost will be.

New AI spend management and the value imperative

For decades, enterprise technology spending was predictable: software by the seat, infrastructure by the server and cloud services by the instance. Finance could forecast annual costs with confidence, while procurement negotiated contracts based on users, licenses, or infrastructure capacity.

Agentic AI changes that model entirely.

Unlike traditional software, AI agents pursue objectives rather than simply responding to prompts, collecting information, evaluating options and executing multi-step workflows with varying autonomy. Their behavior is dynamic, and so is what they consume.



Article by
Christina Fung,
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Services – Global AI Enablement
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Article by
Douglas Vargo,
Vice-President, Consulting
Services - U.S. Operations

This introduces an entirely new economic model for the enterprise. Instead of purchasing software licenses, organizations are increasingly purchasing cognitive capacity and paying for it by the token.

Yet the model invoice tells only part of the economic story. Independent analyses of production AI deployments suggest that more than 70% of total AI costs sit outside the model bill itself, in orchestration, retrieval, retries, observability and the surrounding application architecture. As organizations deploy increasingly sophisticated agentic systems, governing AI spend means managing not only token consumption, but also the entire operating model that enables AI to deliver business value.

When lower AI token costs drive higher spend

Independent analyses of enterprise application programming interface (API) usage show the blended price of frontier models falling roughly 67% year over year, yet estimates of average enterprise AI budgets show them rising from about \$1.2 million to roughly \$7 million over a similar period. In short, cheaper tokens are not producing cheaper bills. Economists call this pattern Jevons Paradox—the observation that when the cost of using a resource falls, consumption of that resource often rises faster than the savings, so total spending increases rather than decreases. Cheaper tokens do not shrink the AI bill, but change what becomes economically viable to attempt.

This feels like the next evolution of FinOps: cloud computing turned infrastructure into a consumption-based service and created a new discipline for governing that spend. Agentic AI is doing the same, shifting

the question from how much AI costs to how organizations estimate, manage and govern an increasingly invisible form of consumption.

This is the AI token economy, or what we at CGI more broadly refer to as agentic AI cost management: the discipline of estimating, managing and controlling variable AI consumption before it controls you.

The organizations that succeed won't necessarily be those that spend the least on AI. They'll be the ones that understand where tokens create value, where they create waste and how to govern consumption as AI becomes embedded across every part of the business.

Why agentic AI costs are difficult to forecast

Agentic AI isn't only an IT cost. [AI consumption is spreading across every business function](#) and increasingly outside centralized control, which is exactly why agentic AI costs are so difficult to forecast.

One of the biggest misconceptions we encounter is that AI costs will become easier to predict as the technology matures. The opposite may be true.

While providers continue to reduce the price per token, the volume of tokens consumed by increasingly sophisticated AI systems continues to grow. Advanced models rely on larger context windows, more complex reasoning and autonomous decision-making.

Finance, procurement and IT leaders are experiencing this challenge in different ways: approving forecasts they can't pin down, negotiating usage-based contracts and choosing among models with no single right answer for every task.

The conversation therefore needs to shift. Instead of asking, "How much will AI cost?" organizations should be asking, "How do we govern AI consumption so that every token contributes measurable business value?"

"The organizations that succeed won't necessarily be those that spend the least on AI. They'll be the ones that understand where tokens create value, where they create waste and how to govern consumption as AI becomes embedded across every part of the business."

A framework for governing the AI token economy

From our experience working with clients, organizations don't need perfect predictions. They need a practical framework for making better decisions. At CGI, we think about this through three connected disciplines: estimate, manage and control.

- **Estimate** means accepting that AI consumption is variable. Rather than relying on a single forecast, organizations should consider the use of scenario-based planning, which reflects

different workloads, user behaviors and levels of adoption. In practice, that means building P50 and P90 consumption ranges for each workload archetype, including simple chat, retrieval-augmented generation and multi-agent orchestration, rather than relying on a single point estimate. We also recommend revisiting those ranges quarterly as usage patterns shift.

- **Manage** focuses on reducing unnecessary consumption without limiting innovation. It includes selecting the right model for the task, optimizing prompts, reusing cached responses where appropriate and designing workflows that minimize waste. Two of the most underused levers are prompt caching, which can cut the cost of repeated context by 50 to 90% depending on the provider, and batch or asynchronous processing, typically discounted around 50% for workloads that do not require an immediate response. Additionally, routing work across a tier of models by task complexity, rather than defaulting every request to the most capable model, is often worth more than any single vendor discount.
- **Control** is about governance. Organizations need visibility into where tokens are being consumed, which business units are generating costs and which AI use cases are delivering measurable value. Practically, this means per-team and per-agent budget ceilings, real-time anomaly detection for token spend and chargeback or showback so that the business unit generating the cost also sees it.

Implementing this requires an operating-model change touching architecture, finance, procurement, governance and culture all at once. Organizations that build this discipline now will be best positioned as adoption accelerates.

This is no longer a niche concern. In early 2026, the [Linux Foundation announced plans for a Tokenomics Foundation](#) to build open standards for measuring and governing AI token cost and efficiency, echoing what FinOps did for cloud spend a decade earlier.

The challenge now isn't simply adopting AI. It's learning how to govern the invisible economy that powers it.

Before your next AI budget conversation, it is worth asking three questions.

1. Do you know which three business units or use cases generate the majority of your token spend?
2. Do any of your production agents run without a budget ceiling or a named owner?
3. And could your finance team forecast next quarter's AI spend within 20%, using actual usage data rather than vendor list prices?

If the honest answer to any of these is no, the token economy is already managing you, rather than the other way around.

CGI works with executives across industries to establish the methodologies and guardrails needed to manage AI costs effectively.

About Christina Fung

Christina leads CGI's global AI Enablement Center of Excellence where she focuses on AI strategy and offerings and drives the company's mandate to enable the responsible use of AI. Previously, Christina was instrumental in the transformation of CGI's global wealth solutions. Her 16 years of experience at CGI has included roles in IT delivery, digital strategy, sales, business unit operations and business solutions. She has led business and technology transformation initiatives with banking clients, developing business and IT strategies and delivering complex roadmaps and innovative technology solutions that achieve expected outcomes and value.

About Douglas Vargo

A seasoned digital leader and strategist, Doug Vargo leads CGI's emerging technology practice for the U.S. East Business Unit. With nearly two decades of experience in developing and delivering complex, innovative solutions and strategies, Doug brings a deep understanding of current challenges and opportunities for how organizations adopt new technologies and digitally transform to modernize their business.





Can AI unlock ERP and Warehouse Performance Potential?

Enterprise Resource Planning (ERP) solutions encapsulates all core business functions, across finance, supply chains, customer relations, and human resources – going beyond just another piece of software.

Traditionally, ERP platforms were inflexible, pricey, and not user-friendly. Processes were also not fully digitalised, so true data visibility came from sifting through physical records that were stored across varied locations and business areas.

Today, ERP platforms paint a very different picture. They offer flexibility, rapid scalability, and are rooted in the cloud which makes them accessible for all business sizes and from anywhere in the world, affording businesses a level of commercial agility unlike any other. This change is particularly beneficial for medium to large businesses that are looking to reduce upfront costs while embedding systems that protect profit margins and enable growth. Increasing AI adoption within ERP solutions is the critical next step in development to boost visibility and traceability of within the ERP process. AI has opened the doors for businesses to introduce a unified system, upskill staff, and implement new processes.

Integrating AI with a people-first approach

Businesses are now in a position where they can leverage AI to automate repetitive processes and streamline processes which can free up more time for both creative and transformative work. AI empowers employees to rethink their day-to-day functions and activities, and create new workflows, allowing them to focus on what is truly important all while create new opportunities for their professional growth. Therefore, AI integration can help business leaders more effectively support their employees.



Article by
Carrie Tallett,
Senior Product Manager,
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Within the logistics and manufacturing sectors, clear data visibility and traceability can be incredibly challenging to achieve. For example, in some instances, records are stored both physically and online, across different, siloed systems, or even different organisations. This makes it difficult for employees to track down information and also reduces auditability.

However, the integration of AI within ERP workflows means that these processes can be efficiently streamlined, and employees can focus their efforts on growing the business and supporting their customers. AI is not replacing SaaS or ERP solutions but is instead shortening the cycle of software development, bringing technological change quicker to the industrial sector, and integrating agents within existing systems. This is providing the opportunity to leverage AI to deliver greater value, with records that are easily accessible for improved auditability and traceability.

“AI is the catalyst that’s pushing organisations towards unified, insight-driven operations. Integrating AI into ERP workflows improves data clarity, expedites reporting, and automates routine tasks so teams can focus on customers and business growth.”

Unification to better the customer experience

As AI continues to streamline SaaS products for the manufacturing and logistics industry, organisations must capitalise on this and create unified systems. They can use these systems to provide the relevant information they may need at any given time from one place. So, organisations can leverage AI to expedite processes and improve customer service.

AI enhances the human endeavour by enabling organisations to remove friction in their workflows. For example, keying in orders is often a fundamental part of the revenue generation process but is repetitive and not the best use of an employee’s time. Scenarios like this is where AI really delivers tremendous value. By removing barriers to customer engagement, organisations can improve relationships, reputation and, ultimately, revenue without the need for significant expenditure.

Automating warehouses and increasing ROI

Looking forward, businesses should be working towards AI and automation within warehouses.

In periods of economic and political volatility, like we are seeing now, it is critical to build resilience and prevent costs growing excessively. Automated warehouses can support businesses by reducing manual handling significantly, with AI providing details around changing supplier costs and reliability and importantly, how these can impact internal supply chains. AI-powered warehouses provide added insight on predictive pricing and recommend cost-effective solutions of when and where to make purchases while tracking stock. Like AI, warehouse automation has the potential to become a critical tool for day-to-day logistics awareness for a wide

range of manufacturers, no longer something which is only available to enterprise level organisations. AI and warehouse automation allow businesses to do more with less, uniting various systems and records across operations to deliver a greater ROI than if delivered in isolation.

Going beyond the basics

AI is the catalyst that’s pushing organisations towards unified, insight-driven operations. Integrating AI into ERP and SaaS workstreams improves data clarity and traceability, expedites the reporting and audit cycles, and automates tasks so that teams can focus on customers and business development.

This intelligence must be taken to the next level and applied to warehouse operations. In connecting unified systems with AI-driven forecasting and real-time decision support, businesses can respond to changes at pace. This translates into better supplier decisions, fluid throughput, and less disruptions across the supply chain all of which drive successful outcomes for warehouses and their customers.

About Carrie Tallett

Carrie Tallett is the Senior Product Manager at Forterro’s Orderwise, where she leads the strategic development of ERP and WMS solutions. She has more than a decade of experience across product management, customer success, and operational strategy. Carrie brings a practical and customer-centric lens to digital transformation. She’s passionate about helping mid-market businesses unlock greater visibility, control, and efficiency across their operations through smart, scalable technology.



Supply Chain Execution: How ERP and TMS Work Together

Supply chain execution (SCE) is the operational phase of supply chain management that drives the physical movement of goods from the warehouse to the customer. While supply chain planning handles forecasting, procurement strategy, and production scheduling, SCE is what turns those plans into physical reality, managing warehousing, order fulfillment, transportation, and last-mile delivery in real-time.

For operations teams, supply chain execution is where ERP data turns into physical movement. Once an order is released, carrier selection, routing, tracking, and delivery depend on how well systems stay connected in real time.

What are the key components of supply chain execution? Supply chain execution covers the daily operational activities that determine how fast and cost-effectively a finished product reaches its destination. Those components include:

- **Order management:** receiving, validating, and releasing customer orders for fulfillment once production is complete and inventory is confirmed.
- **Warehousing:** inventory receiving, storage, put-away, and labor management within the distribution or manufacturing facility.
- **Picking and packing:** fulfilling specific order requirements accurately, including lot tracking, kitting, and hazmat documentation where applicable.

- **Transportation management:** coordinating carriers, [comparing freight rates across shipping modes](#), generating labels and documentation, and managing outbound freight costs.
- **Last-mile delivery:** the final movement of goods to the customer, including [tracking visibility](#) and exception management when shipments are delayed or damaged.

Each component depends on accurate data flowing between systems in real-time. When that data is fragmented or delayed, or when any one component is managed in isolation, execution suffers.

“Supply chain execution is the reactive, real-time counterpart. It acts on those plans and adapts when reality diverges from the forecast.”

What systems are behind supply chain execution?

Modern supply chain execution relies on specialized software to reduce costs and eliminate operational bottlenecks. The core systems each serve a distinct role:

ERP systems handle production, inventory, order management, and financials. They are the system of record for everything that happens before a shipment leaves the facility. [Rootstock Cloud ERP](#), built natively on Salesforce, manages this layer for manufacturers running connected production and fulfillment environments, tracking sales orders, work order completion, and inventory in real-time across the operation.

Warehouse Management Systems (WMS) manage the physical movement of inventory inside the facility, covering receiving, put-away, picking routes, and labor productivity.

[Transportation Management Systems \(TMS\)](#) handle the outbound freight layer, including multi-carrier rate shopping, label generation, shipment processing, and tracking. When a TMS connects directly to the ERP, order data flows in automatically and shipment results write back without manual entry.

What is the difference between supply chain planning and supply chain execution?

Supply chain planning is the strategic, forward-looking phase. It involves demand forecasting, supplier selection, production scheduling, and inventory positioning. Planning answers the question: what do we need, when, and where?

Supply chain execution is the reactive, real-time counterpart. It acts on those plans and adapts when reality diverges from the forecast. A carrier fails to pick up, a production run runs late, a customer changes a shipping address after an order is placed. Execution answers the question: what is actually happening right now, and what needs to happen next?

The distinction matters because the systems that support planning and execution are different. An ERP like Rootstock is built for planning, production management, and record-keeping, connecting financials, inventory, and manufacturing operations in one platform. The execution layer, particularly outbound freight and transportation, requires dedicated tooling that extends the ERP without replacing it.

What are the most common supply chain execution challenges?

Certain supply chain execution challenges surface repeatedly across industries. Three are worth addressing directly:

Freight cost visibility at the point of fulfillment. Operations teams shipping across multiple modes, parcel, LTL, FTL, and international, often default to a preferred carrier because comparing rates manually takes time they do not have. That default carrier behavior compounds across thousands of shipments and creates systematic freight overspend that rarely gets measured until it becomes significant.

Tracking data that lives outside the ERP. When shipment and tracking information sits in a carrier portal or a disconnected system, the ERP record never reflects what happened after the order left the dock. Customer service teams field

delivery questions without visibility, and operations managers spend time reconciling systems rather than managing exceptions.

[Freight invoice errors that go unrecovered.](#) Carrier invoices regularly contain billing discrepancies, incorrect accessorial charges, wrong service level billing, and duplicate invoices. Without a structured audit process integrated into the freight workflow, those errors are rarely caught and almost never disputed, adding cost that compounds quietly over time.

How does a connected ERP address these challenges?

[Rootstock](#) is designed to keep production, inventory, and order management synchronized in real-time. When a sales order is created, Rootstock tracks it through work order completion, inventory confirmation, and fulfillment readiness, giving operations teams a single source of truth for everything happening before a shipment leaves the facility.

That real-time visibility is what makes the handoff to outbound freight possible without data loss. When the ERP record is current and accurate at the point of fulfillment, the freight execution layer can act on it immediately rather than working from stale or incomplete information.

For manufacturers running Rootstock, that handoff connects directly to [FreightPOP](#), a [multi-carrier TMS](#) that pulls sales orders from Rootstock in real-time, processes shipments across 1,500+ carrier connections, and writes tracking numbers and shipment details back to the Rootstock sales order record automatically. The result is a continuous workflow where production data and freight

execution stay in sync without manual reconciliation between systems. Mark Andy, a precision parts manufacturer running Rootstock, uses this integration to compare freight rates at the point of fulfillment and maintain a complete order record from production through to carrier pickup, entirely within Rootstock.

“When ERP and freight systems share data in real-time, a few things change operationally: Shipments are processed against live order data, not a manual export from the ERP.”

What does effective supply chain execution look like in practice?

When ERP and freight systems share data in real-time, a few things change operationally:

Shipments are processed against live order data, not a manual export from the ERP. Rate comparison happens at the moment of fulfillment, not as an afterthought. Tracking information flows back into the ERP automatically, so the sales order record reflects the full lifecycle from production through delivery. And [freight invoice discrepancies are caught and disputed through an audit process](#) integrated into the workflow, not absorbed as an unexamined cost.

For operations teams managing high shipment volumes, the difference is measurable. Freight costs decline as [rate shopping](#) replaces carrier defaults. ERP data stays current without manual entry between systems. And customer service teams answer delivery questions from within the ERP rather than switching between platforms.



About Rootstock

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



AI Enterprise Governance: Building Accountability, Trust and Control for AI at Scale

Most organizations have a strategy for [artificial intelligence \(AI\) adoption](#). Far fewer have thought as carefully about how they'll monitor and control their AI solutions—and the data powering them—once the tools are in use.

Data from Apteon's 2026 Artificial Intelligence Research—a survey of more than 1,500 business leaders in Europe and North America—reveals that while 96% of business leaders believe a formal governance framework is required to use AI safely and effectively, 37% haven't yet built one. Furthermore, 75% say a lack of governance framework is a major barrier to AI success.

For AI agents to earn workforce trust and consistently deliver business value, governance must be built into how they are designed, deployed and operated—not treated as a separate policy exercise.

It's best to start with a clear understanding of your actual sphere of control. You may not control how the underlying commercial or open-weight model was trained, but you can control your agents' business purposes, instructions, approved data sources, system access, permissions,



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Bob Zwarycz,
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actions, validation rules, human-review requirements, testing, monitoring and audit trails.

- Effective AI governance therefore entails:
- Defining what each agent is allowed to do
- Grounding them in trusted business and ERP data
- Limiting access according to least-privilege principles
- Requiring human approval for higher-risk actions
- Continuously monitoring accuracy, usage, exceptions and outcomes

With those measures in place, you can have trust in your own controls surrounding agents, regardless of which model is under the hood, allowing your organization to move past AI anxiety to realize full business value. Whether you build AI agents internally or purchase AI-enabled software, governance remains an ongoing operational responsibility. Your objective is not to guarantee that every model output is secure, compliant or free from bias. It's to identify the relevant risks and put practical controls around how the agent is configured, what data it can access, what actions it can take and how its outputs are reviewed.

Although you may not control the model's original training data or core design, you can materially influence the behavior of the deployed agent through its instructions, approved data sources, access permissions, business rules, testing, monitoring, validation and human-approval requirements.

It's worth noting that AI governance does not need to become a large legal or compliance program. For most mid-market organizations, a proportionate approach is more effective: assign clear ownership, classify agents by risk, document

their intended use, restrict access, require additional review for higher-impact decisions, and regularly monitor performance and exceptions. These controls can be implemented without a large in-house legal or compliance team.

In this guide, we'll show you what effective AI governance looks like and the practical steps you can take to build it.

What Is AI Governance?

AI governance is the framework your organization uses to define how AI systems and agents are selected, designed, approved, deployed, monitored and retired. It establishes who owns each system or agent; what it's permitted to do; what data it may access; when human review is required; and who is accountable for its outcomes. Most organizations do not adopt AI through a single coordinated program. AI capabilities enter the business gradually, through features added to existing software, purpose-built agents, employee productivity tools and/or [intelligent workflows](#) introduced by individual departments.

But as adoption expands, inconsistent practices can emerge. Different teams may use different tools, apply different standards or rely on data of varying quality. Ownership can become unclear, access controls may not reflect the sensitivity of the information involved, and employees may turn to unapproved consumer AI services—a practice commonly referred to as “shadow AI” usage.

Effective AI governance creates a consistent operating model without forcing every use case through the same level of control. Lower-risk tools may require basic ownership, access restrictions and usage guidance. Agents that

access sensitive data, influence important decisions or create and update business transactions require stronger testing, approval, monitoring, auditability and human oversight.

Good governance is not intended to slow AI initiatives. It gives your organization confidence to scale AI more quickly because responsibilities, boundaries and controls are defined before problems occur.

“For AI agents to earn workforce trust and consistently deliver business value, governance must be built into how they are designed, deployed and operated—not treated as a separate policy exercise.”

AI Enterprise Governance Frameworks

Introducing an AI governance framework establishes consistent guardrails for selecting, deploying and operating AI systems. It doesn't eliminate risk or give every employee unrestricted authority to deploy AI. It enables your organization to evaluate each use case, apply controls proportionate to risk and assign clear responsibility throughout the AI system's lifecycle.

A practical framework should formalize:

- **Accountability and ownership:** Assign a named business owner, technical owner and escalation path for each AI system or agent, including responsibility for actions and decisions it influences.
- **Acceptable-use policies:** Define approved tools, permitted use cases, prohibited activities, employee responsibilities and boundaries within which agents may operate.
- **Agent purpose and authority:** Document what each agent is intended to do, what it must not do, which systems and tools it may use and when it may recommend, initiate or complete an action.
- **Data governance:** Control the quality, provenance, sensitivity, retention and permitted use of data accessed or generated by the agent.
- **Access and security controls:** Apply least-privilege access, identity controls, segregation of duties, environment separation and appropriate protection for credentials and business data.
- **Risk management:** Evaluate the potential for inaccurate outputs, inappropriate actions, bias, security failures, privacy issues and unintended business consequences before deployment.
- **Human oversight:** Identify when human review, validation or approval is required, particularly before an agent changes records, initiates transactions, communicates externally or affects higher-impact decisions.
- **Transparency and auditability:** Maintain sufficient records of the agent's data sources, instructions, tool use, actions, approvals, exceptions and

outcomes so its behavior can be reviewed and corrected.

- **Contractual and regulatory compliance:** Apply requirements according to the relevant jurisdiction, industry, data type, customer commitment and use case rather than treating every AI system as subject to the same controls.
- **Training and awareness:** Ensure employees understand which tools are approved, how agents are intended to be used, their limitations and where human judgment remains necessary.
- **Ongoing monitoring and change management:** Reassess agents as models, prompts, data sources, integrations, regulations and business processes change, and suspend or retire systems that no longer perform within approved boundaries.

Who Is Responsible for AI Governance?

AI governance is a shared responsibility, but every AI system and agent needs a clearly named business owner. That individual defines the purpose, acceptable use and required human oversight for the system or agent. Meanwhile, your IT manages deployment, access, integrations, security and monitoring. Data owners control data quality and permitted use, while legal, privacy, risk and compliance teams provide oversight where needed.

You should regularly review responsibilities as agents gain new users, data sources, permissions or use cases.

Your technology provider must also maintain appropriate security, transparency, monitoring and change controls. However, your organization as the customer

remains responsible for deciding where agents are used, what they may access and what actions they are allowed to take.

Internal Governance Ownership

AI governance should not sit with IT alone. Your business's senior leaders should set expectations, assign ownership and ensure governance supports your priorities. Governance should involve all the system/agent owners—business, IT, data, and where applicable security, legal, privacy, HR, risk and compliance teams. Their level of involvement should reflect the particulars of the agent and the data or processes it affects.

Your employees also need clear guidance on approved tools, prohibited uses, human-review requirements and escalation paths. Training and communication help reduce shadow AI usage, standardize use and support responsible adoption.

Vendor and Supplier Accountability

Most organizations adopt AI through third-party platforms and software. The vendors of those platforms and software are responsible for the security, design, operation and monitoring of their AI services. But you as the customer remain responsible for how those services are configured, what data they access and how your organization uses their outputs or actions.

- Vendor due diligence should assess:
- Data use, privacy and retention
- Security and access controls
- Testing, monitoring and auditability
- Capability changes
- Regulatory and contractual commitments
- Support for human oversight and incident response

Trustworthy vendors provide more than AI functionality. They give you the controls, documentation and transparency needed to govern the service throughout its lifecycle.

“Good governance is not intended to slow AI initiatives. It gives your organization confidence to scale AI more quickly because responsibilities, boundaries and controls are defined before problems occur.”

Common Governance Risks in Enterprise AI Deployments

Without a robust governance framework, you can be exposed to significant risks when AI influences business decisions. These include:

Biased or Ungoverned AI

AI can reproduce patterns and weaknesses in historical data. For example, supplier selection data may favor established vendors even when newer alternatives offer better value.

But bias is only one risk. Agents can also make costly errors when given broad authority without validation or human approval.

Governance should therefore include data-quality checks, testing for unfair or inconsistent outcomes,

clear decision boundaries and human review for higher-impact actions.

Majority-Case Optimization

AI often performs best at common, high-volume tasks and may overlook important exceptions. For example, a maintenance agent applying predictive intelligence might prioritize major production lines while underestimating the need for repairs on lower-volume equipment that is still operationally critical.

As such, your governance efforts should include testing for edge cases, business-critical exceptions and unintended prioritization—not just average performance.

Black Box Decision-Making

Your employees should be able to understand, question and escalate AI outputs that influence their work. Without sufficient transparency, they may either trust the system too readily or bypass it entirely.

You should allow AI greater autonomy only where the risk, accuracy and controls justify it. Higher-impact agents require stronger testing, defined decision boundaries, audit trails, exception handling and human approval where appropriate.

Without these controls, autonomy becomes unaccountable black-box decision-making.

How Responsible AI Governance Delivers Business Value

Effective governance helps your organization scale AI with greater confidence. Clear ownership, defined controls and ongoing monitoring reduce delays, rework, security failures and inappropriate use.

Governance can also improve adoption by giving your employees and customers greater confidence in how AI is used. This supports more consistent outcomes, stronger resilience and faster expansion into higher-value use cases.

The result is not simply lower risk, but a more reliable path to your business getting value from AI.

Four Principles of Responsible AI

Sound governance depends on four responsible AI principles:

Controlled Data and Access

You may not control how a commercial foundation model was trained, but you can control the business data used to ground an agent, the systems it can access, the actions it may take and how its outputs are validated. These controls reduce (but don't eliminate) the risk of bias, error and inappropriate use.

Cross-Functional Expertise

Your business users, operational teams, data owners and technical specialists should help design and test agents. Their involvement identifies process exceptions and risks that technical teams may otherwise miss.

Transparency and Auditability

Make sure all of your users understand your agents' purposes, data sources, authority, limitations and approval requirements. Important actions should be traceable so outcomes can be reviewed, challenged and corrected.

Continuous Monitoring

Agent performance can change as data, integrations, models and business processes evolve. For that reason, your plan should include AI

governance monitoring, periodic performance reviews and clear triggers for intervention.

How To Build an AI Governance Framework

An AI governance framework defines how your agents and other AI systems are approved, operated, monitored and retired. Six practical steps provide a strong foundation:

1. Define Acceptable Use and Authority

- Identify approved and prohibited uses.
- Define what each agent may access and do.
- Establish acceptable risk levels.
- Require human approval for higher-impact actions.

2. Document Purpose and Controls

- Record the intended use, owner, data sources, integrations and limitations.
- Document testing, approval and human-review requirements.
- Update the record when the agent or its use changes.

3. Apply Risk-Based Approval

- Evaluate agents according to their data, authority and potential impact.
- Review higher-risk agents before deployment.
- Reassess them when permissions, models, integrations or use cases change.

4. Assign Ownership and Escalation

- Name a business and technical owner for every agent.
- Define accountability for its outputs and actions.
- Establish processes for reporting, investigating and resolving issues.
- Understand that an AI agent cannot be held accountable. If an autonomous purchasing

agent creates an incorrect order, responsibility still belongs to the organization and the people assigned to govern that process.

5. Train Employees

- Explain which AI tools are approved and how they should be used.
- Clarify when outputs must be questioned, validated or escalated.
- Train users on limitations and required human judgment—not just product functionality.

6. Govern Third-Party AI

- Understand which AI capabilities are included and configurable.
- Confirm how customer data is processed, retained and protected.
- Assess security, monitoring, auditability and incident response.
- Define how model and functionality changes are communicated.
- Document the responsibilities of both the vendor and the customer.

How Aptean Supports Responsible AI Governance

Responsible AI governance provides the structure you need to scale AI while maintaining security, accountability and operational control. Your organization doesn't need a large governance department, but you do need to establish clear ownership, defined boundaries and controls proportionate to each use case.

Our AI platform, AppCentral, and our consultative offering Aptean Intelligence as a Service (AlaaS) support this approach through:

- Identity, access and permission controls
- Separation of customer, internal

and demonstration data

- Grounding agents in authorized operational and ERP data
- Defined limits on the systems and actions available to each agent
- Human validation or approval for actions where the risk warrants it
- Logging and monitoring to support review and troubleshooting
- Regional deployment options supporting applicable data-residency requirements
- Industry- and application-specific agents designed around established business processes

These capabilities help enforce but do not replace your governance framework. They provide practical controls to help you define how agents are used, what they may access and when human oversight is required.

That way, your organization can establish a controlled foundation for deploying AI agents securely, consistently and at scale.



About Bob Zwarycz

With over 20 years of experience in enterprise IT and cloud architecture, Bob helps our customers modernize outdated ERP systems and eliminate technical debt, and now leads Aptean's shift from traditional systems of record to AI-driven systems of execution. Prior to Aptean, he spent over a decade helping colleges and universities across the world move their student, financial, HR and CRM systems to the cloud.



Turn Trusted GovCon ERP Data Into Earlier Action

Learn how Champ™ Agents, powered by Wyatt helps government contractors turn trusted ERP data into faster answers, earlier risk signals, and clearer action across projects, billing, compliance, and finance.

Government contractors do not need more data. They need to understand what their data is telling them, identify what needs attention, and act before a small issue becomes a project, cash flow, or compliance problem.

Contracts, projects, labor, funding, billing, costs, revenue, backlog, compliance records, deliverables, approvals, and cash all move through the business every day. For many teams, that information lives in the ERP system, the trusted system of record that keeps the organization accurate, accountable, and prepared.

But having the data is not the same as being able to act on it quickly.

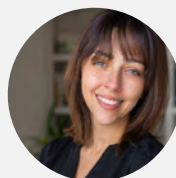
A project may be burning funding faster than planned. An invoice may be delayed because backup is missing. A contract may be approaching an option deadline. A timekeeping exception may require attention before it becomes an audit concern. An executive may need a clear view of margin, backlog, cash, and staffing risk before the next leadership meeting.

The information exists. The challenge is getting from information to action fast enough to make a difference.

That is where [Champ™ Agents, powered by Wyatt](#) comes in.

Champ™ Agents helps GovCon teams turn trusted [Unanet ERP](#) data into faster answers, earlier risk signals, and clearer next actions across project delivery, billing, compliance, and financial performance.

Together, these AI companions help transform ERP from a system of record into a system of action.



Article by
Katie MacDonald,
Senior Product Marketing Manager



GovCon Teams Need More Than Static Reporting

Government contractors already have reports, dashboards, exports, spreadsheets, month-end packages, project reviews, billing reports, AR aging, contract trackers, and compliance reviews.

Each serves a purpose. But many of the most important business questions do not fit neatly inside a prebuilt report:

- Which contracts are at risk of margin erosion this month?
- Which projects are over budget, behind schedule, or burning funding too quickly?
- Which invoices are delayed, disputed, or blocked, and what needs to happen next?
- Where are we seeing documentation gaps or audit-sensitive exceptions?
- What should leadership be watching across revenue, cash, backlog, margin, staffing, and compliance?
- Protect margin by identifying project and funding risk earlier
- Improve cash flow by exposing billing and collections blockers sooner
- Strengthen audit readiness through more consistent exception monitoring
- Reduce the time teams spend assembling and interpreting reports
- Give leaders a clearer view of performance, risk, and decisions
- Turn trusted ERP data into more consistent action across the business

Answering those questions often requires pulling information from multiple reports, reconciling spreadsheets, adding context, and relying on a specialist to explain what the numbers mean.

“Government contractors do not need more data. They need to understand what their data is telling them, identify what needs attention, and act before a small issue becomes a project, cash flow, or compliance problem.”

That takes time. And in GovCon, timing matters.

A margin issue identified after month-end is already late. A billing blocker that remains unresolved affects cash flow. A missed funding cliff can disrupt project delivery and staffing. A compliance issue caught during an audit is harder to address than one identified during the normal flow of work.

GovCon teams need a better way to see risk earlier, understand what is happening faster, and move toward the right action with confidence.

The Outcomes Champ Agents Supports

Champ™ Agents, powered by Wyatt is designed around the way government contractors operate and the outcomes that matter most across the business.

Protect Project Performance

Project and program leaders need to know when budget, funding, labor, schedule, and delivery expectations begin to drift out of alignment.

Champ™ Agents, powered by Wyatt can help teams identify funding burn ahead of plan, budget or margin variance, underbilling, staffing gaps, upcoming deliverables, and projects that may require corrective action.

The goal is not simply to explain what happened. It is to help leaders identify risk while there is still time to protect performance, funding, and margin.

Accelerate Billing and Cash Flow

Billing and finance teams need faster visibility into invoices that are delayed, rejected, unpaid, disputed, or missing required documentation.

Champ™ Agents, powered by Wyatt can help summarize the issue, identify the amount, customer, contract, age, owner, and reason for the delay, and recommend the next step.

By making billing blockers easier to identify and review, teams can reduce the chance that cash-impacting issues sit unnoticed until the next reporting cycle.

Strengthen Compliance and Audit Readiness

Compliance depends on consistent execution, timely review, and complete documentation.

Teams need to know when timekeeping exceptions, cost transfers, expense issues, missing support, or approval gaps require attention.

Champ™ Agents, powered by Wyatt can help summarize exceptions, provide relevant context, and support recurring reviews that strengthen audit readiness and documentation discipline.

The value is not just being prepared for an audit. It is making compliant execution part of the normal operating rhythm of the business.

Improve Executive Visibility

Executives need a clear view across revenue, cash, backlog, funded backlog, margin, staffing, project performance, compliance risk, and

the decisions that require leadership attention.

Those answers often require multiple reports and follow-up questions. Champ™ Agents can help create a clearer, repeatable operating view so leaders spend less time assembling information and more time making decisions.

Three Ways GovCon Teams Move From Insight to Action

Champ™ Agents, powered by Wyatt helps Unanet GovCon ERP users move through three connected modes of work: Chat, Chores, and Roundups.

Chat: Understand What Is Happening

Chat helps users ask business questions in plain English and receive answers grounded in their Unanet GovCon ERP data and connected business files.

Instead of starting with a report menu, export, or spreadsheet, a user can begin with the question they are trying to answer.

A finance leader might ask:

“Which invoices are delayed, disputed, or blocked? Identify the reason, owner, amount, age, contract, customer, and recommended next action.”

A project leader might ask:

“Which of my projects are trending over budget, behind schedule, or burning funding faster than planned? Explain the cause and recommend corrective actions.”

The value is not simply receiving an answer. It is receiving an answer connected to the way GovCon teams operate across contracts, projects, funding, labor, billing, compliance, backlog, and cash.

Chores: Stay Ahead of What Needs Attention

Some questions should not have to be asked repeatedly.

If a team reviews the same project risks every Monday, checks blocked invoices every morning, or monitors compliance exceptions each day, that work should become a repeatable operating motion.

Chores help teams create recurring monitors for important risks, exceptions, and next steps.

For example:

Every Monday morning, check for contracts with margin variance greater than 5%, funding burn above plan, or indirect-rate pressure. Summarize the causes and recommended actions.

Or:

Every morning, identify invoices that are unsubmitted, rejected, unpaid for more than 30 days, or missing backup. Identify the responsible owner and recommended next step.

Chores help teams move from reactive review to proactive follow-through. Instead of waiting for a meeting, missed deadline, or month-end report, teams can identify what needs attention earlier.

Roundups: Create a Repeatable Operating View

Government contractors run on operating rhythms. Finance teams manage month-end close. PMOs conduct project reviews. Contracts teams monitor modifications, funding actions, option periods, and deliverables. Executives need a clear view of performance, risk, and decisions.

Roundups help turn recurring analysis into reusable operating reports that teams can revisit, refine, and share.

An Executive GovCon Health Roundup might combine pipeline, expected awards, backlog, funded backlog, revenue forecast, margin, cash, staffing, compliance risk, and leadership decisions needed.

A Program Performance Roundup might include project health, budget versus actuals, funding burn, schedule risk, deliverables, staffing gaps, and corrective actions by project manager.

Roundups help teams spend less time rebuilding the same analysis and more time acting on what the analysis shows.

From Trusted Data to Confident Action

The promise of [*AI in GovCon ERP*](#) is not novelty. It is not replacing the ERP or removing human judgment from important business decisions. And it is not introducing another disconnected tool that teams have to manage outside the systems where work already happens.

The promise is helping government contractors use the trusted data and business context they already have more effectively.

Champ™ Agents, powered by Wyatt, helps GovCon teams:

That is the shift from ERP as a system of record to ERP as a system of action.

The system of record remains the trusted foundation. Champ™ Agents makes that foundation easier to understand, monitor, and act on, helping GovCon teams move from knowing what happened to shaping what happens next.

UPDATING...

How to Future-Proof Your Business with the New BisTrack 202X

Organisations that upgrade today are building resilience for tomorrow.

Is your business keeping up with the pace of technological change? In a shifting marketplace, building suppliers are feeling the pressure from every direction. Economic uncertainty, labour shortages, rising costs, supply chain disruption, cybersecurity threats, and growing customer expectations are reshaping how distributors operate.

For many BisTrack Release 3.9 customers, upgrading to the latest BisTrack Release 202X may feel like a major undertaking. It's true that there is always a learning curve with newly updated solutions; however, modernisation today is less about replacing what works and more about protecting your business for the future.

During our recent webinar, The New BisTrack, Epicor experts shared why modernising your ERP is one of the most practical investments you can make for your business — not only to benefit from the latest innovations, but also to strengthen security, improve productivity, and stay competitive.



Article by
Christoph Cyrol
Product Marketing Manager

EPICOR

Why Modernisation Is No Longer Optional in Distribution

[Recent IDC research](#) highlights the growing challenges across the distribution industry, everything from geopolitical uncertainty to changing workforce skill demands. Yet despite these looming potential obstacles, only 13% of distributors consider themselves fully prepared for the digital future.

It's time to fully acknowledge the train coming full-speed down the track. Businesses that delay digital transformation often experience disconnected processes, frustrated employees, dissatisfied customers, and increased exposure to cybersecurity risks. Fortunately, modern ERP systems help organisations respond more quickly to change while providing the foundation for future technologies such as artificial intelligence and advanced analytics. Smart companies seek solutions that continue to keep pace with customers, suppliers, and market demand.

Top Benefits

- Strengthens protection against evolving cybersecurity threats.
- Creates a stronger foundation for AI and future technologies.
- Improves operational agility during changing market conditions.
- Helps maintain a competitive edge in a changing industry.

Easier Navigation and Easier Adoption With BisTrack Web

One of the most visible improvements in BisTrack Release 202X is BisTrack Web. Designed with a modern browser-based interface, it delivers a cleaner, more intuitive user experience while preserving the familiar business processes users already know.

“Modernisation today is less about replacing what works and more about protecting your business for the future.”

Employees can securely access BisTrack from virtually anywhere using a web browser on desktops or tablets. Navigation requires fewer clicks, making everyday tasks faster and reducing training requirements for new users. Embedded learning resources further simplify onboarding, while configurable dashboards provide users with information tailored to their role.

The latest releases also introduce innovations such as embedded AI capabilities, enhanced order management, improved route planning, expanded API integration, and greater configuration flexibility. These enhancements help employees work more efficiently as they provide better service to customers.

Top Benefits

- Modern, intuitive interface that accelerates user adoption.
- Browser-based access for greater flexibility and mobility.
- Faster navigation that improves daily productivity.
- Built-in innovation through AI, APIs, and continuous enhancements.

One Connected Business Means Greater Visibility Epicor Financials - update

Managing operational data and financial information within separate systems often creates duplication, delays, and unnecessary complexity. Epicor Financials helps eliminate those challenges by providing a fully integrated financial management solution alongside BisTrack.

Because both applications share the same modern user experience, employees can move between operational and financial tasks without learning an entirely different system. Finance teams benefit from integrated general ledger, accounts payable, financial reporting, budgeting, forecasting, and planning capabilities.

The result is greater visibility across the organisation, improved financial control, and faster access to reliable information that supports better business decisions.

Top Benefits

- Consistent user experience across operational and financial systems.
- Improved financial visibility and reporting.
- Reduced manual processes through tighter integration.
- Faster adoption with familiar workflows and navigation.

Upgrading Doesn't Mean Starting Again - update

Perhaps the biggest misconception surrounding BisTrack Release 202X is that moving from Release 3.9 requires a complete ERP re-implementation.

In reality, the migration follows a proven, repeatable upgrade methodology developed by Epicor

Consulting Services. Rather than rebuilding your business system from scratch, the process modernises your existing environment while preserving the data, configurations, and business knowledge you have built over many years.

The upgrade begins with a secure backup of your current environment before automated tooling performs the transformation. Validation and quality assurance are completed before customers review the upgraded system and decide when they are ready to go live. Throughout the project, your live production environment remains protected, allowing day-to-day operations to continue with minimal disruption.

This structured approach significantly lowers project risk, giving organisations confidence that their valuable business information will remain intact.

Top Benefits

- Proven upgrade methodology that reduces project risk.
- Preservation of existing business data and configurations.
- Minimal disruption to daily business operations.
- Automated validation provides predictable project outcomes.

What is the Long-Term Value of Modernising with BisTrack?

Moving to BisTrack Release 202X means more than accessing new features. It positions your business on a modern platform that continues to evolve through regular updates and ongoing innovation.

Modern SaaS infrastructure reduces the burden of managing servers and infrastructure, delivering enhanced resilience and stronger security. As a result, internal IT teams spend less time maintaining systems and more

time supporting strategic business initiatives.

Instead of facing another major upgrade several years from now, organisations gain continuous access to improvements that help them remain competitive as technology evolves.

Top Benefits

- Modern SaaS platform with continuous innovation.
- Reduced IT administration and infrastructure costs.
- Enhanced resilience and cybersecurity protection.
- Faster access to future product enhancements.

“Modernising your ERP does not mean replacing everything that already works. Rather, it means having the wisdom and foresight to protect your existing investment with the tools necessary to meet tomorrow’s challenges.”

Looking Ahead with Confidence - update

Remember, modernising your ERP does not mean replacing everything that already works. Rather, it means having the wisdom and foresight to protect your existing investment with the tools necessary to meet tomorrow’s challenges.

BisTrack Release 202X preserves your business knowledge, delivers a modern user experience, strengthens security, and creates a platform that continues to evolve with your business. Instead of a disruption, reframe this upgrade as a practical step towards building a more resilient, productive, and future-ready organisation.

Ready to Explore Your Options?

Every business has its own priorities, timelines, and operational requirements. If you’re currently running BisTrack Release 3.9 and would like to understand what an upgrade could look like for your organisation, speak with your Epicor Account Manager.

They can discuss your current environment, explain the available migration options, and help you identify the approach that best supports your business goals.

EPICOR

About Chris Cyrol

Chris Cyrol is an experienced product marketing manager specialising in the tech industry, having worked with leading companies like Sony, Corel, InFocus, and RingCentral. Currently at Epicor Software, he focuses on translating product functionalities into effective strategies for the distribution and building supply sectors.



As AI Agents Transform Commerce, Salesforce Unleashes Its Biggest Agentforce Commerce Release Yet

One platform connecting shoppers, merchants, and AI apps across B2C, B2B, point of sale, and order management.

The agents are here: Shopper Agent, Buyer Agent, and Merchant Agent are generally available now — with native integration into ChatGPT; Google Search, including AI Mode; and the Gemini app arriving this summer.

Agentic commerce has arrived in full force, and it has already reshaped the customer journey. Look at this past holiday season. AI influenced 20% of global online sales, worth \$262 billion. Peak season also revealed a clear pattern. Some AI strategies far outperform others. Retailers running their own shopper agents grew sales 59% faster than retailers still on the sidelines. These gains hold year-round too. AI-referred traffic converts at eight times the rate of social.*

Product discovery has moved. Customers now begin shopping using AI assistants like ChatGPT and Gemini, often well ahead of any traditional search bar. Commerce needs a foundation built for that reality, and Agentforce Commerce delivers exactly that. That foundation shows up in what sits behind the experience. The business logic and customer data underneath decide whether an agent can promise a real delivery date, honor a contract price, resolve a service issue, and earn the next purchase. That foundation has long been Salesforce's strength, and the more AI shapes the front end, the more it matters.

Here's what most of the conversation misses: Agentic commerce reaches well beyond how customers buy. It reshapes how companies sell and operate, giving merchandisers a faster way to run promotions while developers launch storefronts and operators route orders with new intelligence. The distinction that matters most is action. Generative AI holds a conversation, while agentic AI checks inventory, confirms the shipping cutoff, and closes the sale.

Agentforce Commerce gives you a workforce of ready-to-deploy agents your business owns and your data grounds. Shopper Agent carries the customer conversation from discovery through checkout and into service, speaking in your voice on your storefront. For B2B, Buyer Agent meets buyers inside WhatsApp and SMS. Running the back office, Merchant Agent lets your team organize catalogs, sort products, and respond to trends in plain language. Each one moves past the bolt-on chatbot model, wired natively into your catalog, inventory, and orders from the first day.

The agentic era bridges the gap between owned channels and external AI apps

Ensuring that your products show up in new LLM-driven channels is only half the battle. The other half? Connecting your owned properties with external channels so the shopper who finds you in ChatGPT or Gemini and the shopper on your site are one known customer, not two strangers.

"Referral traffic to brand sites will be hugely influenced by AI platforms — Gemini, ChatGPT, Anthropic — and social apps like Instagram and TikTok. But commerce itself will happen predominantly on owned and operated properties: your website, your app, your messaging

channels, your stores. Syndicated commerce with UCP will also play an important role long-term, driving commerce directly into external channels, and we're providing Agentic Commerce comprehensively across all channels. The brands that win will have their Shopper Agent live on their own properties for the 2026 shopping season." — Nitin Mangtani, EVP & GM, Agentforce Commerce

With the latest Agentforce Commerce release, you can deploy AI agents you own with full context of your customer relationships, proprietary data, industry-leading business logic, and the ability to seamlessly connect to external AI apps. This is our most exciting release in years — innovations across B2C, B2B, Order Management, and Point of Sale, with the full lineup at salesforce.com/uk/commerce/innovations. Here are 12 highlights from our latest release:

"Generative AI holds a conversation, while agentic AI checks inventory, confirms the shipping cutoff, and closes the sale."

1. Shopper Agent for your storefront GA now

Live today, Shopper Agent brings conversational, intuitive shopping to your own storefront, matching the experience customers now expect from AI assistants while maintaining your brand's voice and your control. A shopper can simply ask, "Can I get these trail shoes delivered before my flight Saturday morning?" The agent checks real inventory, confirms the carrier cutoff, offers store pickup nearby as a backup, and closes the deal in one conversation, from question to confirmation. Return later with a question, and it carries the full context and history. Where a generic chatbot stalls, Shopper Agent knows your catalog and your customer, so it sells the way your best associate would. This summer, it gets sharper still, adding guest order tracking (no account required) and intelligent FAQs that answer questions right on the product page.

2. Agentic Commerce Search for AI-native discovery

GA July 2026

We recently acquired Cimate — context-aware, AI-native search — and it's now fully integrated into the core Agentforce Commerce platform as Agentic Commerce Search. It's a discovery engine that reads intent well beyond keywords, surfacing the right product the moment a shopper describes what they're after. You can run it anywhere your storefront lives, including non-Salesforce sites. Early customers are reporting double-digit improvements in both conversion and add-to-cart rates.

"PacSun's purpose is to inspire the next generation of youth and build a community grounded in innovation and authenticity across every emerging channel. We believe the

integration of Agentforce Commerce with OpenAI presents a powerful opportunity to extend our products into AI platforms like ChatGPT, transforming conversations into meaningful engagement and lasting relationships with our Gen Z and Gen Alpha customers. With Agentic Commerce Search we deliver highly relevant, seamless discovery experiences that set a new standard for modern retail.” — Shirley Gao, Chief Digital & Information Officer, PacSun

3. Deep integration with ChatGPT, Gemini, and Google AI Mode

ChatGPT GA July 2026 · Google Search, including AI Mode, and Gemini app GA summer 2026

With Agentic Commerce Channels, you meet shoppers where they’re already searching. Through our OpenAI integration, your product catalog connects directly to ChatGPT, synced straight from Business Manager — no extra software, no third-party tools. And available this summer, our integration with Google enables shoppers to seamlessly discover and purchase your products across Google Search, including AI Mode, and the Gemini app. Both run on your existing commerce rails. Most importantly, you remain the merchant of record, and every order lands on the same platform that runs your service, loyalty program, and marketing — not in a separate admin panel waiting to be reconciled.

4. Storefront Next for faster launches **GA now**

Launching gets dramatically faster. Storefront Next makes it possible to stand up a production-ready storefront in under 30 minutes, and it’s included in every B2C Commerce SKU. The agentic developer toolkit

ships with over 40 prebuilt skills and integrations for the AI coding tools your developers live in — and the new Commerce Apps Framework lets developers and their agents build next-generation apps that are, for the first time, discoverable and installable right from Business Manager with clicks. We’re launching the framework alongside a roster of launch partners including Stripe, Adyen, Amplience, Avalara, Mirakl, Noibu, Zenkraft, Forter, Contentstack, Vertex, Bazaarvoice, and ESW.

“As a team driven to work at the forefront of emerging technology, being selected as a pilot partner to help shape Storefront Next — Salesforce’s new frontend platform built with performance and AI development at its core — is exactly where we want to be. It’s fast to run, easy to adopt, and already delivering better than anticipated progress. This is the kind of pioneering work that truly brings out the best in our engineers.” — Luke Barber, Head of Ecommerce Technology, Iceland Foods

“The brands that win will have their Shopper Agent live on their own properties for the 2026 shopping season.”

5. B2B Buyer Agent for procurement orchestration

GA now

B2B buying is complex, yet buyers expect it to feel as easy as consumer shopping. Generally available today, the B2B Buyer Agent orchestrates the entire procurement process in the channels buyers use every day, WhatsApp and SMS. A buyer at a manufacturing distributor can simply text, “Need 40 cases of the 16-oz fasteners, same as the March order,” and instantly get product images to confirm the exact SKU, current contract pricing, and a completed order. No portal. No login. No phone tree. Underneath that simplicity is real procurement depth. Multi-Cart and Round-Trip Quoting handle buying the way enterprises actually operate with multiple purchases in flight at once and seamless cart-to-quote-to-cart negotiation while Mobile Publisher lets you ship fully branded iOS and Android buyer apps without custom development.

6. Full headless flexibility for B2B

GA now

The bigger architectural shift underneath B2B commerce. It now runs fully headless, natively, as part of the broader Headless 360 vision. Two paths, one back end. Use our head — Salesforce’s fully templated front end on Lightning Web Runtime and Experience Builder, the fastest path from idea to production with no engineering team required. Or build your head — a custom React storefront, a sales rep’s WhatsApp, an AI agent, a partner system, anywhere your buyer is. Either way, the same back end, catalog, pricing, accounts, and Buyer Agent run underneath. You build the surface; the platform powers it. It’s why only Agentforce Commerce can run B2B commerce everywhere your buyer shows up.

7. B2B Search for business buyers

GA now

Technical buyers need surgical precision. B2B Search brings synonym management, weighted attributes, and predictive discovery to the storefront, with extensible search endpoints developers can tailor — so a buyer finds the exact component and merchants keep control of relevancy.

8. Merchant Agent for the back office

GA now

Conversational interfaces aren't just for customers. Merchant Agent gives natural-language capabilities to your operations team, ending the swivel-chair work of running a storefront. Your teams organize catalogs, create boost and bury rules, and tune sort orders by describing what they want instead of clicking through admin menus. Early customers are already cutting time to task by 88%, lifting the burden of manual rules and freeing merchandiser hours for strategy.

9. Agentic Order Management for intelligent fulfillment

GA now

Agentic Order Management brings a conversational interface to fulfillment, on infrastructure proven at enterprise scale, with inventory unified across 7,000 locations and 250 million records. Operators adjust routing in natural language; surface disruption alerts before customers feel them; and — with new cost-based routing — select the fulfillment node that protects your margin, not just your delivery promise.

10. Visual Merchandising Workspace for data-driven curation

GA now

Merchandising becomes a data-driven, single-screen workflow. The Visual Merchandising Workspace surfaces Data 360 signals such as conversion lift, inventory health, and brand-affinity scores directly on a customizable product grid, so merchants turn real-time signals into immediate action without toggling between tools or context-switching during curation.

11. Unified Catalog and Orders across every channel

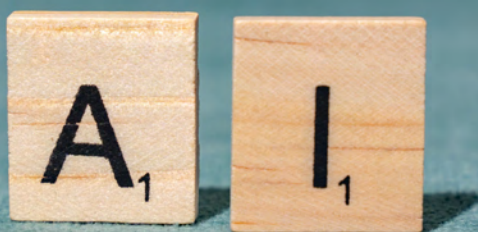
GA now

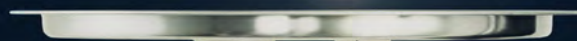
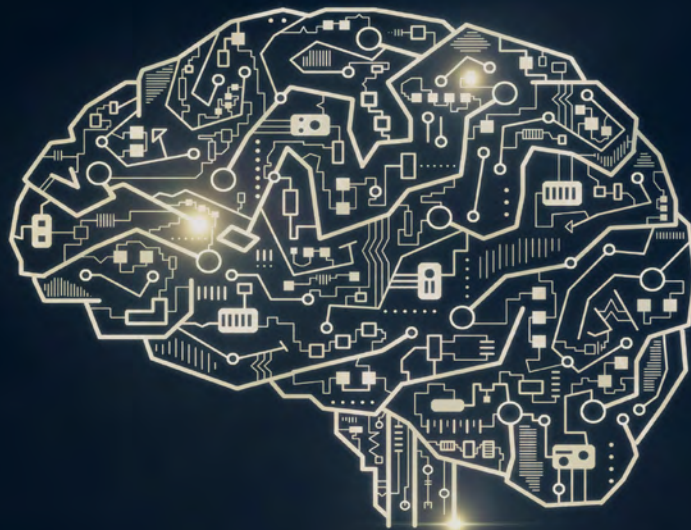
One catalog, shared across POS and your storefront, so store associates and shoppers finally see the same thing. Even better, associates can modify or cancel any order, digital or in person, from anywhere in the store. The era of “let me call the online team” gives way to answers in the moment.

12. Modern Point of Sale on Android and Windows

iOS GA now · Android and Windows GA August 2026

The same Modern POS runs on the hardware your stores already use, live on iOS today, with Android and Windows arriving this August. VIP customers check out without digging for a wallet, using securely tokenized card-not-present payments. Retailers go live fast, too — launching POS in as little as 18 weeks and cutting store setup from a day and a half to under an hour.





The partner problem: The new rules of AI adoption in hospitality

For most of this year, the news cycle has been inundated with discussions of artificial intelligence (AI). From apocalyptic-sounding warnings of sentient super intelligence to the ever-percolating anxiety of mass job replacement and a near-constant stream of AI-powered promises from companies new and old, we have seemingly bulldozed past “buzzword” territory. Today, AI seems entrenched as a central talking point, whether we love and use it or fear and avoid it.

Behind that media fervor, countless businesses have engaged in what is best described as an AI adoption arms race, sprinting toward the glossy promise of lean operational intelligence and never-before-seen levels of productivity. And who can blame them? In a vendor landscape flooded with exciting new entrants and countless providers offering the same core capabilities, innovation feels more accessible (and inevitable) than ever.

The question is no longer whether to adopt. It is how, with whom, and perhaps most importantly, at what cost if you get it wrong. Every technological tipping point

brings some level of fallout or recalibration. And as the adoption curve starts to resemble a feeding frenzy, some companies will find themselves at risk of making costly mistakes.



Article by
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Where there is opportunity, there is also risk

At the end of May, Inc. published an article titled [*"The \\$500 Million AI Mistake Every Company Is Rushing to Avoid,"*](#) which detailed the viral story of an unnamed company that "accidentally" spent roughly \$500 million US on AI tokens in a single month. In that same vein, Futurism published an article titled [*"Corporations Reeling from Huge AI Costs with No Clear Benefits,"*](#) noting that as the costs to access powerful AI tools soar, company leaders are beginning to ask some difficult questions. This particular piece cited the widely circulated comments from Uber COO Andrew Macdonald, where he admitted that AI costs were quickly outpacing gains in productivity.

Among the list of companies publicly slighted by rapid AI adoption is Pizza Hut. The popular fast-food chain recently made headlines after one of its biggest franchisees revealed that the chain's push to adopt an AI-driven delivery management platform turned its once high-performing delivery operation into a disaster. According to the franchisee, the software caused widespread operational problems, delivery delays, customer complaints, and a collapse in sales, wiping out more than \$100 million US in business and enterprise value. In this particular case, it wasn't that the system itself was lacking or poorly designed—it was simply a poor fit for the location's DoorDash-dependent operation and was ushered in without adequate adaptation, training, or support.

These examples aren't meant to stoke adoption anxiety, but they do serve as cautionary tales of what can happen when adoption moves too fast without the right oversight, guardrails, and vendor relationship. AI that works in theory but fails

in practice is still a failure—and someone has to pay for it no matter how steep the cost.

"Successful adoption is not guaranteed; it is a people problem."

The adoption gap: Technology is only as good as its users

If every human on Earth were given a premium Claude subscription tomorrow and given the same task to complete, the quality of outputs would vary dramatically. Why? Because access to powerful tools does not guarantee effective use. A company could adopt an AI tool that is an objectively perfect fit for their operational needs, but it can still fail if the end users do not adopt it willingly and effectively.

Hospitality is not a forgiving operating environment, and providing an exceptional, personalized guest experience at scale is no easy task. The right AI infrastructure can help to close that gap, but a staff member who doesn't understand or trust the tool will undermine its value regardless of how sophisticated or well-suited it is.

Successful adoption is not guaranteed; it is a people problem. The right partner addresses this by providing training, onboarding, ongoing education, and change management support. This is where enterprise providers with deep hospitality experience hold a decisive advantage, because they possess a deep understanding of the operational environment and, more importantly, the human dynamics within it.

What are the new competitive differentiators?

Over the last two years, the hospitality technology landscape has shifted—and by that, I mean it has flattened. Where there was once a glaring divide between legacy platforms and new, more innovative entrants, there is now a feeling of relative feature democratization. The promise of innovation is no longer the dangling carrot it once was. Rather, it is the baseline upon which every vendor is building.

Today, many feature sets that were once proprietary and coveted—like comparable natural language capabilities and similar property management system (PMS) integrations—are widely available at roughly comparable price points.

So, if feature disparity is no longer the differentiator, what is? What separates one vendor from the next? How do operators choose?

With the technology itself largely commoditized, the question of which AI partner to adopt shifts away from the sophistication of the underlying model and toward everything surrounding it. This includes the depth of industry experience behind the tool, the security and governance architecture supporting it, the implementation methodology, and the accountability structure that stays in place long after the contract is signed.

Let me be frank. A great demo from a new entrant, no matter how compelling, cannot substitute for hard-won institutional experience in the industry it claims to serve. There is a meaningful difference between knowing an industry and understanding it. One can be acquired relatively quickly through research and hiring. The other is built over years of actually operating.

What differentiates providers now is not what their platform does. It is who stands behind it, what happens when it fails, and whether their industry understanding runs deep enough to see around corners that a generalist provider simply cannot.

The enterprise advantage: Why scale and security are non-negotiable

As the influence of AI continues to multiply, so do the questions pertaining to security infrastructure and data privacy. There is a short list of enterprise technology providers who offer the kind of well-insulated compliance architecture, security infrastructure, and track record of demonstrated performance that operators should expect from vendors. But this level of governance and institutional trust takes years and significant investment to build, and most new entrants to the AI market simply do not have the runway to build it.

At some point in any AI adoption conversation—often when the chief finance officer (CFO), the legal team, or whoever manages risk gets involved—someone will ask these questions: What are the guardrails? What are the security protocols? What happens when something goes wrong?

For organizations that have selected the right enterprise partner, that question has a well-documented

and defensible answer. For those who chose on the basis of a feature set alone, it often does not.

When the cost of getting AI adoption wrong has proven capable of erasing nine figures in enterprise value, the vendor relationship is never purely a technology decision. It is a risk decision, a trust decision, and a long-term partnership decision—and it should be treated as such.

“Getting it right means choosing a partner accountable for the outcome, not just the delivery.”

What intelligent adoption actually looks like

Intelligent AI adoption starts with an honest assessment of where AI creates real operational value within a specific property’s context. Not where a vendor’s demo is most impressive, but where the actual pressure points live and where technology can meaningfully address them. It includes deployment that accounts for how a property actually operates, not how it might operate in a best-case scenario.

The Pizza Hut example, for all its scale, is ultimately an exemplary story about what happens when implementation skips this step. When a system that works is applied to a context it wasn’t built for, without the adaptation, training, or support required to bridge that gap, the result is not a technology failure. It is a partnership failure.

Getting it right means choosing a partner accountable for the outcome, not just the delivery. One that stays in the room through the iterative, always-human process of making a new tool actually work, including the edge cases, the staff resistance, the workflow mismatches, and the months that follow go-live, when most vendors have moved on. That is where the difference between a vendor and a genuine partner becomes visible. And it is, ultimately, where the return on investment (ROI) is won or lost.

About Alan Young

A seasoned business and technology visionary, Alan Young is the VP of Product Management for Infor Hospitality. He is recognized for his provocative insight into how emerging technology impacts industries and how leaders can better connect with their customers and employees for sustained growth. Alan also sits on several hotel and travel technology advisory boards and is known for his ability to turn difficult concepts into easy-to-understand ideas that drive meaningful outcomes and actions. He is a respected thought-leader, battle-tested consultant, mentor, and sought-after keynote speaker on the topics of hotel technology, business strategy, growth, transformation, and innovation. Alan focuses on increasing business awareness and believes that everything hinges on the power of communication and effective storytelling.



UNIT4

AI in Finance Works Best When the Foundation Is Right. Because Your AI Is Only as Good as Your Ledger

AI in finance is real, it's accelerating, and the organizations getting the most from it have one thing in common. It's not the model they chose. It's the data underneath.

The promise is genuine. AI can transform how finance teams work. Anomaly detection that catches errors before close. Spend classification that takes minutes instead of days. Predictive cash flow models that update as transactions land. The capability is here, maturing fast, and worth investing in.

So why do some organizations see breakthrough results from AI in finance while others struggle to get past the pilot stage?

The answer has less to do with the AI itself and more to do with what the AI is working with.

The data readiness gap

AI models are pattern machines. They find structure in data, surface relationships humans would miss, and scale analysis beyond what any team could do manually. But they have one non-negotiable requirement: the data they consume must be trustworthy.

In finance, “trustworthy” carries specific meaning. Balances must be current, not as of last reconciliation. Transactions must be classified consistently, not differently depending on which sub-ledger captured them. Entity structures must be reflected accurately, not assembled through manual consolidation at period end.

Many organizations discover this the hard way. They invest in an AI-powered analytics layer, connect it to [their financial systems](#), and find that the outputs feel unreliable. Not because the AI is flawed, but because it is faithfully reflecting the inconsistencies in the underlying data. Fragmented ledgers produce fragmented insight. No amount of algorithmic sophistication fixes that.

The gap between AI’s potential and AI’s actual impact in finance has a name: data readiness. And it is primarily an architecture problem, not a technology selection problem.

What “AI-ready” financial data looks like

Finance teams that extract consistent value from AI share a common data profile. Their financial data is:

- **Unified.** All transactions live in a single structure. There are no parallel sub-ledgers maintaining separate balances that need reconciliation. When AI queries the data, it queries one truth, not several versions of one.
- **Real-time.** The data reflects the current state of the business, not a snapshot from the last close cycle. AI models trained on stale data produce stale recommendations. Real-time data means real-time intelligence.

- **Always balanced.** Every entry maintains the integrity of the full ledger. There are no timing gaps, no pending adjustments, no consolidation entries waiting to be posted. The data is clean at the point of creation, not cleaned after the fact.
- **Dimensionally rich.** Transactions carry the classification detail that AI needs to surface meaningful patterns. Entity, currency, cost center, project, geography. The more dimensions captured at entry, the more patterns AI can find without human pre-processing.

This profile is not aspirational. Organizations running on [single-ledger architectures](#) already have it. Their financial data is AI-ready by default, not by project.

“The differentiator is not the intelligence layer. It is the foundation.”

The architecture underneath shapes the AI on top

Consider two organizations implementing AI-powered spend analytics. Both use capable tools. Both have skilled teams. The difference is infrastructure.

Organization A runs on a sub-ledger architecture. Before the AI can analyze spend patterns, someone must extract data from multiple systems, reconcile it, normalize the classifications, and load it into the analytics platform. That process takes days. By the time the AI produces results, the data is already aging. And every month, the cycle repeats.

Organization B runs on a unified ledger where spend data is classified at entry, balances are always current, and drill-down from any aggregate to any source transaction is native. The AI queries the live system. Results are current. No extraction, no reconciliation, no normalization project.

Same AI capability. Fundamentally different outcomes. The differentiator is not the intelligence layer. It is the foundation.

AI as accelerator, not substitute

This distinction matters because the industry narrative around AI in finance sometimes implies that AI will compensate for data problems. That it will clean messy data, reconcile discrepancies, and find truth among conflicting sources. AI can help with some of those tasks. But using AI to fix data problems that the architecture creates is using your most powerful tool on your lowest-value work.

The better approach: let the architecture handle data integrity so AI can focus on what it does

uniquely well. Pattern recognition at scale. Predictive modeling. Anomaly detection. Strategic scenario analysis. These are the applications where AI genuinely changes how finance operates. And they all require a foundation of clean, unified, trustworthy data. You can [explore more finance insights on our blog](#).

The foundation-first approach

If you are evaluating AI for your finance function, or struggling to scale an AI initiative already underway, start with a diagnostic question: how much effort does your team spend preparing financial data before any analysis can begin?

If the answer involves reconciliation between sub-ledgers, manual consolidation, spreadsheet-based normalization, or multi-day data extraction routines, your AI tools are operating with a handicap. They will work. They may even produce useful output. But they will never reach their potential while the underlying data requires reconstruction before every use.

The organizations seeing the strongest returns from AI in finance made a foundational decision, often before AI was even on their roadmap. They chose a [financial architecture](#) where the data is always unified, always balanced, and always current. When AI arrived, they were ready. Their data was too.

Getting the data foundation right does not just prepare you for today's AI capabilities. It prepares you for everything that comes next. Every future innovation in financial intelligence, from advanced forecasting to autonomous close processes, will depend on the same thing: a ledger you can trust completely, without proving it first.

Unit4 Financials by Coda delivers the unified, always-balanced financial data foundation that makes AI work the way it should. Explore the platform at unit4.com/financials-by-coda.

UNIT4





ERP Migration: A Commerce-First Guide

ERP migration for commerce brands in 2026: how to decide between replacing ERP or moving commerce first, with a practical framework.

For many commerce teams evaluating enterprise resource planning (ERP) migration in 2026, the pressure is coming from two sides: operational complexity and customer expectations.

ERP systems are designed to maintain stable financial and operational records. Customer-facing commerce often moves faster than ERP update cycles. Teams can end up managing inventory mismatches at checkout and fragmented customer data across systems.

These problems can affect whether customers come back: [29% of consumers say they stop buying from a brand](#) after a poor customer experience, online or in-person. At the same time, US ecommerce sales reached [\\$1.23 trillion in 2025](#) and accounted for 16.4% of total retail sales, as ecommerce continued to outpace overall retail growth.

ERP migration is one route to address these issues. This guide is for commerce-led businesses considering an ERP migration in 2026. It covers how to decide whether to

replace the ERP or replatform commerce, then outlines a commerce-first architecture for moving customer-facing work off the ERP while keeping finance and operations connected.

What is ERP migration?

ERP migration is the process of moving business-critical data, configuration, and workflows from one [enterprise resource planning system](#) to another. That can mean replacing an existing ERP entirely. It can also mean unbundling commerce from an ERP-centric stack while keeping the ERP for finance and business operations.



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For commerce-led businesses, the second path targets constraints in customer-facing commerce. ERP systems govern back-office operations: finance, inventory, procurement, manufacturing, and reporting. They're less effective at running customer-facing work like storefront experience, checkout, merchandising, or B2B buying workflows.

Here are two paths to consider for better ERP and commerce performance:

Path A: Replace the ERP while replatforming commerce

This can make sense when the ERP itself is end-of-life or misaligned with current operations. Expect higher cost, a longer timeline, and more operational risk.

Path B: Move commerce to a modern platform, and keep the ERP for back-office operations

This retains the ERP as the system of record while relieving pressure on the storefront, B2B portal, and point of sale (POS).

With Path B, the ERP remains the record-keeper. Commerce moves to a platform built for faster merchandising, checkout performance, B2B workflows, and omnichannel visibility.

A commerce platform like Shopify sits in front of the ERP as the customer-facing layer. Bidirectional integration keeps inventory and orders aligned between systems, along with customer and catalog data.

The distinction between migrate, integrate, and sync matters throughout the project. Migration is a one-time transfer of records from one source system to another.

Integration then connects two live systems so data flows between them on an ongoing basis. Sync keeps both sides aligned on the specific data fields that need to match continuously.

“The distinction between migrate, integrate, and sync matters throughout the project.”

Why commerce brands migrate off ERP-centric commerce

Path B starts to make sense when ERP-centric commerce begins producing visible problems like updates shipping slowly, data accuracy degrading, and customer experience becoming harder to control. When product data, inventory, and the customer record live in separate source systems, customers feel the disconnect as they shop.

Customer experience (CX) teams still struggle to turn customer insights into coordinated action. [*Medallia's 2026 "State of Customer Experience" report*](#) found that 66% of CX practitioners believe experiences improved over the past year, but only 17% of consumers agree. The

same research found that 30% to 40% of departments take no action after receiving customer insights.

With ERP-centric commerce, some problems can show up frequently across operations. Use this checklist to identify them in your own architecture:

- Inventory discrepancies between the storefront and the back office are frequent enough that support teams work around them daily.
- Product updates or promotions need developer or [ERP team](#) involvement to reach the storefront.
- B2B buyers struggle with account self-service for quotes, reorders, negotiated pricing, or role-based permissions.
- [Customer data](#) is fragmented across POS, storefront, and ERP, so segmentation and loyalty programs underperform.
- Integration maintenance consumes more engineering time than new feature delivery.
- Launching a new site, market, or brand takes longer than the commercial window allows.
- Order exception rates are rising, and manual reconciliation absorbs operations capacity.
- Technology cost per order is growing faster than revenue per order.

When several of these patterns appear together, the fix may be a commerce layerbuilt for fast storefront updates, integrated with an ERP that still handles finance and inventory reporting.

Sea Bags shows what that looks like in practice. The brand is a Maine-based maker of recycled sailcloth bags with 36 retail locations, and they were splitting their operations across a Clover POS, a Salesforce Commerce Cloud storefront, and a NetSuite ERP.

Customer records, inventory, order history, and pricing rules were fragmented. [After Sea Bags consolidated their operations on Shopify](#) with a NetSuite Connector integration, the brand began capturing 1,200 customer emails weekly at POS checkout. Platform fees dropped by 20% (a \$70,000 first-year savings), and POS email opt-in reached 47%.

ERP migration vs. ERP integration: Choosing the right architecture

The next decision is architectural. The choice usually comes down to three options:

- Replace the ERP entirely, alongside the commerce layer.
- Replatform commerce only, keeping the existing ERP and integrating with it.
- Phase the work: Move commerce first, then migrate the ERP on a separate timeline.

Each fits a different set of conditions.

1. **Replacing the ERP** fits when the ERP itself is the constraint. Triggers include vendor end-of-life dates, regulatory gaps, multi-entity limitations, or maintenance costs outpacing replacement costs. From the commerce side, these constraints show up as blocked product launches, an inability to support multi-market pricing, or storefront workarounds that engineering can no longer sustain. Replacement is high-cost and has a long timeline ([mid-six figures](#) for a medium-complexity move taking five to eight months). It's worth the disruption when the ERP can't be fixed by integration alone.

2. **Replatforming commerce only** suits brands where the back office is stable, but the

customer-facing side needs to evolve. The ERP continues to handle finance, inventory, procurement, and reporting. Commerce moves to a platform built for fast storefront updates, B2B workflows, and omnichannel visibility. [ERP integration](#) handles the data flow between the two.

3. **Phasing the work** applies when the ERP needs replacing eventually, but commerce can't wait. Move commerce first, integrate with the existing ERP, then migrate the ERP on a separate timeline. Spreading the work limits operational risk and preserves customer experience through the ERP cutover.

Options 2 and 3 both start by replatforming commerce, whether or not the business migrates to another ERP later. If you're choosing Option 1, [ERP Research](#) is a useful source for finding a new ERP system. The architecture and framework below pick up where options 2 and 3 leave off.

"The root problem is business process design, not system capability."

The next step is mapping ownership across three categories: what stays in the ERP, what moves to commerce, and what syncs between them. This is where apparent ERP problems often turn out to be integration or commerce-layer problems instead.

A starting architecture for commerce replatforming

The table below lays out a starting architecture for commerce businesses running an ERP plus Shopify.

Shopify is designed for [unified commerce](#) at enterprise scale. Storefront, POS, B2B, and customer data live on one commerce platform. Finance, supply planning, and operations stay on the ERP of record. The integration layer handles the handoff.

Keep in ERP Move to Shopify Sync between both General ledger and financial consolidation Storefront user experience (UX) and merchandising Product catalog and variant data Accounts payable and receivable Checkout, payments, and fraud screening Inventory by location Procurement and purchase orders B2B buyer portal, company accounts, contract pricing Price lists and buyer-specific pricing Manufacturing and supply planning POS and in-store experience Customer accounts and contact data Financial reporting and regulatory compliance Promotions, loyalty, and customer segmentation Order status and fulfillment tracking HR, payroll, and workforce management Omnichannel marketing tools Returns and warranty records Tax record of transactions (source of record) Role-based buyer permissions Tax-relevant transactional data

For brands running this architecture, the Shopify Global ERP Program

includes [certified connectors](#) for NetSuite, Microsoft Dynamics 365 Business Central, Brightpearl by Sage, Acumatica, and Infor. SAP-led environments follow a different route. SAP doesn't offer a first-party Shopify connector. Integration happens through integration-platform-as-a-service (iPaaS) platforms or custom API connections built with [specialist partners](#).

**“Data
quality
matters
more
than data
quantity.”**

A commerce-first ERP migration framework

The framework below sequences a commerce-first ERP migration to minimize disruptions. Order flow, inventory accuracy, and customer experience stay intact. It assumes the starting point is existing ERP-centric or fragmented commerce. The target is a Shopify commerce layer integrated with an ERP, new or existing, for back-office work.

1. Audit your current architecture and business processes

A thorough audit starts with system inventory, but it can't stop there. Map the failure points that affect customers and revenue, not just the systems that hold them.

Document the following before writing a migration plan:

- Every source system that holds customer, order, product, inventory, pricing, or financial data
- How data moves between systems, how often, and via which integration method
- Manual workarounds that operations or support teams have built to compensate for integration gaps
- Broken customer journeys: inventory mismatches, checkout errors, and B2B quote bottlenecks
- Order-exception rates and the categories of exception behind them
- Lead times for product updates, market launches, and promotional changes

Teams may discover during the audit that the root problem is business process design, not system capability. Porting legacy processes into a new system can recreate the original constraints. The audit requires collaboration across commerce leaders, IT, finance, and operations leads to prevent this.

2. Decide what data to migrate, archive, and sync

Not every legacy record belongs in the new environment. Split data into three categories before extraction begins:

- Operationally necessary data: Active customer accounts, current product catalog and variants, open orders, live pricing and price lists, inventory positions, and any records required for ongoing fulfillment or compliance.
- Historical reference data: Closed order history, superseded product data, and archived customer records. This may move to the new commerce platform, stay in the ERP, or go to a data warehouse for reporting and advanced analytics.
- Live synchronized data: The fields that flow continuously between Shopify and the ERP after go-live: product and variant updates, inventory by location, order status, customer accounts, tax-relevant transactions, and returns.

Work through this checklist for typical data fields requiring a decision:

- Customer accounts, contact records, and segmentation data
- Product catalog, variant structure, and media assets
- Contract pricing and B2B price lists
- Inventory by location, including committed and available quantities
- Open orders and fulfillment status
- Historical order and returns data
- Tax records and jurisdictional settings
- SEO assets, URL structure, and redirects (if storefront URLs change)
- Promotional and loyalty records

Data quality matters more than data quantity. Duplicate customer records, incomplete product data, and legacy SKU taxonomies produce worse outcomes after migration, not

better. Investing in [data profiling](#) and cleaning before extraction helps support reliable [ecommerce data integration](#) after cutover.

If storefront URLs will change, plan redirects before launch. A poorly handled [SEO migration](#) can erase months of organic traffic and take quarters to recover.

3. Choose your integration model and implementation partners

Three integration patterns cover most commerce ERP platform migration projects.

- **Prebuilt or certified connector:** This is the fastest deployment and has the lowest ongoing maintenance. It works best for standard pairings: Shopify and NetSuite, Shopify and Microsoft Dynamics 365 Business Central, Shopify and Acumatica, and similar certified connections.
- **Middleware or iPaaS:** Useful when multiple systems need orchestration. For example, Shopify, an ERP, a warehouse management system (WMS), and customer relationship management (CRM) platform may all need to share data. Platforms like Celigo, Boomi, Jitterbit, and Patchworks provide prebuilt templates that handle a large part of the integration work, with configuration completing the rest.
- **Custom API integration:** This is usually reserved for niche legacy systems where no connector fits. Requires a higher upfront cost and ongoing engineering investment. In return, it offers more flexibility.

Partner selection matters as much as the method you choose. A migration partner needs more than integration engineering experience. They

also need commerce operations experience, including data mapping, cutover planning, order flow testing, and post-launch support.

When selecting partners, make sure they have references from ERP data migrations of comparable size. For B2B-heavy operations, [ERP integration](#) shifts the partner criteria further toward wholesale workflow expertise and negotiated-pricing complexity.

Gesswein shows what this kind of partner selection can deliver. The 110-year-old precision tools distributor had 12,000 SKUs running through a fragile BigCommerce-ERP connector. The system was producing frequent product and inventory mismatches.

Essential B2B functions, including quote generation and reordering, relied on unreliable plugins. [Gesswein migrated to Shopify](#) with implementation partner Zaelab, which built a custom Acumatica integration. From there, transactions rose 101% year over year. Site traffic grew 225%, site visitors rose 343%, and the brand reported double-digit revenue growth.

4. Rebuild commerce workflows before cutover

Workflows that matter most should be redesigned before go-live to avoid reproducing their original constraints.

Workflows worth redesigning include:

- **B2B ordering:** Company accounts, role-based permissions, approval chains, negotiated pricing, and reorder patterns
- **Returns and exchanges:** Cross-channel policy, restocking flows, and financial reconciliation

- **Inventory exposure:** Which channels see which stock, safety stock rules, and low-stock behavior
- **Omnichannel fulfillment:** Ship-from-store, buy online, pick up in-store (BOPIS), and cross-location transfers
- **Promotions and discounts:** Tier-based, time-boxed, and buyer-specific offers

Shopify's native B2B features support several of these directly. Company accounts, buyer permissions, price lists, and Shopify Flow keep workflow logic in the commerce layer. That's cleaner than layering the same logic across ERP customizations and third-party plugins.

Simon Pearce is a brand that shows the gains available from workflow redesign. The Vermont glassware and pottery maker ran separate ecommerce, POS, and B2B systems, all integrating into an outdated ERP. Inventory updated once daily. POS outages disrupted peak-season operations.

After glassware brand [Simon Pearce moved to Shopify](#), they gained real-time inventory visibility across stores and eliminated POS reliability issues. The platform now supports over 400 wholesale partners on the same system. Custom engraving approval moved from a multi-day email workflow to same-day, with in-store and online preview.

5. Test in phases, validate aggressively, and plan cutover

Migration testing involves a sequence of validation gates:

- **Data migration dry runs:** Extract, transform, and load into a test environment. Reconcile record counts and spot-check data integrity. Document mapping errors.

- Integration testing: Verify bidirectional syncs. Inventory updates should flow from ERP to Shopify, and orders from Shopify to ERP. Customer changes should move in both directions.
- Order flow testing: Walk test orders through the full lifecycle. Cover B2B purchase orders, POS transactions, returns, exchanges, partial shipments, and split payments.
- Permissions and role testing: Verify that staff, store managers, and admins see and can do only what they should.
- Performance testing: Load-test the storefront, checkout, and POS under expected peak conditions, including promotional and Black Friday and Cyber Monday (BFCM) traffic.

Validate data after load. Reconcile key figures against the source systems before and after cutover, including financial totals, inventory counts, customer counts, and tax liabilities. Discrepancies that appear after launch are more expensive to fix than those caught in staging.

A phased rollout can reduce your risk in larger environments. Going live by brand, region, or channel allows each phase to inform the next. A successful phased rollout includes a rollback plan for each phase, with documented triggers for when to use it. A realistic timeline with named milestones also gives finance and ops leaders the reference points they need to keep the migration project on track.

6. Train teams and measure post-launch success

Training starts before go-live, not when it happens. Give operations, merchandising, customer service, and finance teams hands-on access to the new environment during user

acceptance testing. Document the workflows that changed most. B2B account management, returns, and inventory adjustments often see the biggest structural shifts.

“Migration testing involves a sequence of validation gates.”

Post-launch success is measured in operational and commercial terms, not in whether the migration was completed on schedule. Track these metrics from the first reporting period after launch:

- Inventory accuracy, by location and by channel
- Order exception rate and categories of exception
- Storefront performance: site speed, uptime, and checkout conversion
- Time to publish product updates or launch promotions
- B2B self-service adoption, including quotes, reorders, and buyer portal usage
- Total cost of ownership (TCO) for the combined commerce and ERP stack

- Support tickets categorized as data-sync or reconciliation issues

If improvements don't show in the first reporting period after launch, the integration pattern, data mapping, or workflow redesign needs revisiting.

Brand Collective shows the maintenance dividend available at scale. The Australian retail group runs 19 brands on Shopify with Apparel21 ERP integrated via DotApparel middleware. After [Brand Collective consolidated their portfolio on Shopify](#), new site migrations take only about three months. Teams report up to 60% less time spent on maintenance and upgrade work, alongside 10% sales growth.

ERP migration planning checklist

Work through the items below before drafting a project plan:

- Every source system that holds customer, order, inventory, or pricing data is documented.
- The top customer-affecting failure points are identified and quantified.
- All data is classified as operationally necessary, historical reference, or live-synced.
- Integration partners are shortlisted by pattern (certified connector, iPaaS, custom).
- Workflows requiring redesign before cutover are named and owned.
- Success metrics are agreed between finance, operations, IT, and commerce leads.
- A phased rollout plan exists by brand, region, or channel.
- A rollback plan with documented triggers exists for each phase.



Odoo x Hang Seng University: Next-Level Learning Through Business Case Competition

Two Years and Beyond: Odoo Education continues Hang Seng University partnership

After two years of hosting hands-on workshops at Hang Seng University of Hong Kong (HSUHK), Odoo Education took collaboration to the next level.

On May 29, Odoo Education held the finals for the Odoo X HSUHK Pitch Cup—a dynamic business case competition designed to challenge students to tackle real-world digital transformation scenarios using ERP software.

The Journey: From Briefing to Pitching

In cooperation with HSUHK lecturers Dr. Jack Wu, Head of Cloud Innovation School and Dr. Cathy Lam, Director of Big Data Intelligence Centre, the competition kicked off on April 1 with a comprehensive briefing and training session at the HSUHK.

Students across all academic levels—from Year 1 through Year 4—were presented with a complex business case built around a fictional Coffee Roasting Business.

The case required students to solve interconnected challenges across key business functions, including:

- Procurement & Purchasing: Streamlining raw material sourcing.
- Inventory Management & Production: Balancing stock levels with production schedules.
- Online Presence & Sales: Driving e-commerce strategy while managing direct customer sales channels.

Teams analyzed supply chain bottlenecks, tested workflow improvements in Odoo, and submitted video pitches demonstrating their strategic solutions.

Finals at the Odoo APAC Office

After a highly competitive review of all video entries, the top 5 teams received an invitation to the final round hosted at the Odoo APAC Office in the Sai Ying Pun district.

The day began with a warm welcoming speech delivered by Odoo executives Hugo Pommarede, Head of Finance & Operations and Sylvie Xiong, Human Resources Manager.

“Today is not only about who can make the best presentation. It is about seeing how you understand a real business problem, how you translate that problem into a practical solution, and how you use Odoo to show that solution clearly.

In the workplace, this is exactly the kind of skill we value. We look for people who are curious, proactive, logical, and willing to learn. We do not expect young talents to know everything from day one. But we do look for people who can think, communicate, adapt, and keep improving.”

-Sylvie Xiong
Odoo APAC's HR Manager,
in her welcome remarks to
HSUHK students

Following the opening remarks, the top teams took center stage to deliver their live final pitch presentations to a panel of Odoo experts.

It was a tough decision but in the end, Team 3 Nuts won the Pitch Cup competition. Made up of LI Chun Ki Isaac, LEUNG Yau Si Jasper, and YEUNG Hang Chi Gordon, the team impressed judges with their sharp business acumen, smooth Odoo software navigation, and innovative approaches to operational management.

Exploring Careers Inside Odoo

The event was about more than just pitching; it was an immersive experience inside a global tech organization.

[Cherilyn Low](#), Odoo's Talent Acquisition officer for Campus Recruitment, led an insightful Career Talk, sharing perspectives on career growth in the tech ecosystem, key skills employers look for, and potential opportunities within the ERP industry.

Finally, host of the event and L&D Training Manager Kerlen Banasig gave the students an exclusive office tour. The finalists got a behind-the-scenes look at Odoo's culture, workspace, and the teams driving digital transformation across the Asia-Pacific region.

Looking Ahead

The Odoo X HSUHK Pitch Cup marked a memorable milestone in an ongoing relationship with Hang Seng University. Students transitioning from workshop participants to confident strategists pitching in front of industry experts highlights the power of experiential learning.



Finance Leaders Demand AI Transparency as 71% Reject Unexplained Decisions

New white paper commissioned by Sage reveals that seven in 10 finance leaders will reject AI outputs they cannot explain, highlighting the need for more transparent, accountable AI

[Sage](#), the leader in accounting, financial, HR and payroll technology for small and mid-sized businesses (SMBs), announced new research revealing that 71% of finance leaders would reject an AI tool that was 99% accurate if it could not explain its answers.

The findings from “The Emerging Economics of AI in Finance” white paper suggest that explainability is becoming a critical requirement for AI adoption in finance, as organizations seek greater confidence, control and accountability over AI-generated outputs.

Based on a global survey of more than 2,000 senior finance decision-makers, including 832 respondents in the U.S., the research found that more than half of organizations would be willing to pay more for AI solutions that provide greater visibility into how decisions are made. The findings indicate that explainability is becoming an increasingly important factor in how organizations evaluate AI.

“In finance, almost right has always been wrong. As AI takes on more complex financial workflows, the cost of uncertainty is simply too high,” said Aaron Harris, CTO at

Sage. “This research shows that the next era of AI won’t be won on raw model intelligence alone; it will be won on trust infrastructure. Finance teams cannot afford to spend hours playing detective with black-box AI outputs. They need solutions that bring transparency, control and traceability into the systems behind their outputs, so they can execute with absolute confidence.”

Key findings from the research include:

- **The rise of the “Verification Tax”:** Finance professionals spend nearly 13 hours every week reconstructing, validating and defending AI outputs. In the U.S., nearly half (49%) spend 15 or more hours a week on verification, while almost one in five (19%) spend 30 or more hours.
- **Accuracy alone is not enough:** 71% of finance leaders would reject a 99%-accurate tool if it could not explain its answers, signaling that auditability and reasoning traces are becoming essential in high-stakes finance workflows.

- **Finance teams are becoming AI’s trust layer:** When asked what skills mattered most for a finance leader hired today, U.S.-based respondents placed risk, governance and decision judgment first (32%), valuing it nearly twice as highly as deep technical accounting (17%).
- **Transparency is becoming a vendor selection factor:** More than half of organizations (54%) would pay a premium for AI that provides greater visibility into how outputs are generated, signaling that explainability is becoming a procurement requirement, not just a product feature.

From Black-Box to Glass-Box AI

The findings point to a broader shift away from traditional black-box AI systems, where outputs are difficult to interrogate, toward more transparent glass box approaches that provide visibility into the reasoning, sources and logic behind AI-generated recommendations.

This shift is becoming a business requirement, not just a technical preference. Seventy-one percent of finance leaders say a vendor’s shift to Glass Box design principles would strongly or critically elevate its status as a preferred partner.

In response to growing demand for transparency and auditability, Sage’s approach to AI in finance is built on trust by design—with AI that finance teams can interrogate, govern and rely on, with explainable and verifiable outputs, controlled actions and complete traceability of every AI-driven decision. By embedding transparency and auditability into its AI capabilities, Sage is enabling finance teams to act with greater confidence, control and accountability.

Kevin Permenter, Research Director, Financial Applications at IDC, added: “The organizations that will achieve the most durable AI advantage are those that reframe trust infrastructure not as a constraint on AI deployment, but as the foundation on which scalable AI is built. Organizations have a choice: act early to operationalize trust or risk becoming overwhelmed by verification overhead.”





Acumatica Acquires Vertrax, Backing the ISV's Growth in Fuel and Energy Distribution

Longtime partner with industry-specific IP, rapid growth, and a shared commitment to customer success joins Acumatica

[Acumatica](#), a leading provider of cloud ERP solutions for growing businesses, announced its acquisition of [Vertrax](#), a longtime Acumatica partner and trusted provider of cloud-native software solutions for the fuel and energy distribution industry. Vertrax will operate as a business unit of Acumatica under the Vertrax brand, expanding Acumatica's industry-specific capabilities and strengthening its ability to help businesses streamline operations, adapt to change, and grow with purpose-built technology.

"Vertrax's exceptional industry-specific IP, built on the Acumatica platform, delivers significant benefits to its growing customer base," said John Case, CEO of Acumatica. "Our shared commitment to customer success makes this a natural fit, and together we'll deliver great value to fuel and energy distribution companies."

The acquisition, finalized July 2, brings an experienced team of more than 40 to Acumatica. Current products, services, customer relationships, pricing, contracts, and ongoing projects will continue without interruption.

"Joining Acumatica creates exciting opportunities for our customers and our team," said Vinny Mullineaux, CEO of Vertrax. "Our business is growing rapidly, and with Acumatica's backing, we can accelerate that momentum. By combining our deep expertise in fuel and energy distribution with Acumatica's cloud ERP platform and robust ecosystem, we can deliver even more value to the industry while continuing to provide the specialized knowledge and trusted support our customers rely on."

For more information about Acumatica and its industry solutions, visit www.acumatica.com.



SAP Completes Acquisition of Prior Labs

[SAP](#) announced it has completed the acquisition of Prior Labs, the pioneer of Tabular Foundation Models (TFMs).

The acquisition will accelerate SAP's success in TFMs that started with SAP-RPT-1 and bring one of the world's leading TFM research teams into the SAP family. Prior Labs will continue to operate as an independent entity, with SAP committing to investing more than €1 billion over the next four years to scale it into a globally leading

frontier AI lab for the structured data that underpins the world's businesses.

For additional information about the acquisition, see the [press release](#) from May 2026.



Unanet GrowthStudio Named Winner of 2026 CUSTOMER Magazine CRM Excellence Award

Award recognizes Unanet's AI-first innovation empowering project-based businesses to win more work and grow more predictably

[Unanet](#), the leader in AI-first ERP and growth software for project-based businesses, has been recognized by CUSTOMER Magazine with the prestigious CRM Excellence Award for its [GrowthStudio](#) platform. The honor is Unanet's fourth recognition in the last year acknowledging the impact of the company's AI-first innovation that powers thousands of businesses nationwide.

By investing in AI-first innovation Unanet is continuing to empower its customers with purpose-built AI to predict, profit from and manage projects, all with compliance and growth at the forefront. This strategy is exemplified by CUSTOMER Magazine's recognition of GrowthStudio, Unanet's growth automation platform architected to help small and mid-sized GovCons focus on the opportunities they are best positioned to win using the teams they already have.

“Our AI-first strategy isn’t about adding AI to existing workflows—it’s about fundamentally reimagining how GovCons identify opportunities, make smarter decisions, and grow their business,” said Craig Halliday, CEO of Unanet. “We’re honored that CUSTOMER Magazine recognized GrowthStudio because it reflects our commitment to delivering practical AI that helps businesses grow more predictably, compete more effectively, and maximize the potential of every pursuit.”

The value of an AI-first approach is reflected in the results customers are achieving. Unanet’s recently released [10th annual GAUGE Report](#), which identifies the characteristics of high-performing GovCons, found that firms using AI in their business operations are winning more than 50% of the opportunities they pursue.



The 2026 CRM Excellence Awards, recognized companies whose products and services go beyond traditional customer relationship management—encompassing the full enterprise and every phase of the customer journey. Each winner demonstrated through data, outcomes, and real-world performance how their innovations have tangibly transformed client organizations by streamlining processes, deepening engagement, and strengthening long-term customer loyalty.

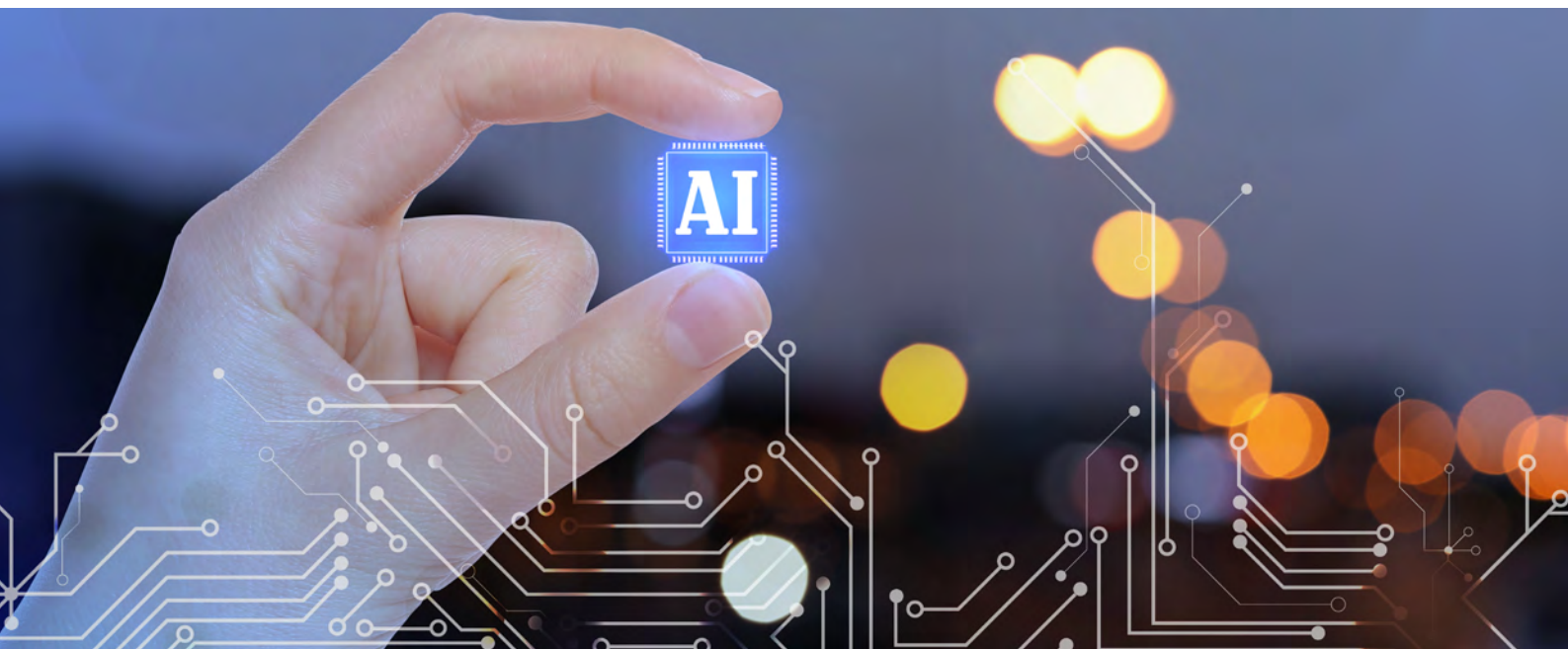
“One of the most respected, and longest-running awards in the contact center tech space, the CRM Excellence Awards have celebrated the visionaries driving true progress in customer relationship strategies since 2000,” said Rich Tehrani, CEO of TMC. “This year’s recipients stand out not just for their technology, but for the proven results they deliver—helping businesses retain their most valuable asset: their customers.”

About Unanet

Unanet is the leader in AI-first ERP and growth software for project-based businesses. Trusted by more than 4,200 government contractors, architecture, engineering, and construction firms, Unanet unifies financials, projects, and pursuits with built-in automation and compliance—all supported by a dedicated customer success team. This empowers leaders to make confident, real-time decisions that drive growth from pipeline to profit. Learn more at unanet.com.

About CUSTOMER Magazine

TMC’s CUSTOMER magazine, originally launched in 1982 as Telemarketing magazine, remains the go-to resource for news, insights, and strategies that elevate customer engagement across all channels. Each issue explores the latest advancements in AI-powered CX, omnichannel communication, agent enablement, customer journey analytics, conversational AI, automation, mobile and cloud-based solutions, workforce optimization, and more. For additional information, please visit <https://www.customerzone360.com>.





Aqurus Solutions, Gold Certified Acumatica Partner, Secures Global Top 1% Ranking for High-Participation ERP Implementation

*Record-Breaking 94% Survey Response Rate and 4.69 CSAT Validate Calgary Firm's Proven
[ERP Implementation Model](#)*

[Aqurus Solutions Inc.](#), a premier Acumatica Gold-Certified Partner, announced it has outperformed global benchmarks in the Spring 2026 Acumatica Customer Survey. Achieving a 4.69/5 Customer Satisfaction (CSAT) score, Aqurus has earned a place within the top 1% of the worldwide Acumatica Channel Network—a distinction driven by the firm's systematic approach to Enterprise Resource Planning (ERP) implementation and delivery.

Quantifying Client Impact

In an industry where ERP implementations are frequently viewed as high-risk digital transformations, Aqurus's customer survey results reflect unprecedented client engagement and transparency:

- **Survey Response Rate: 94.12%** (Reflecting near-total customer participation)
- **CSAT Score: 4.69 / 5.00** (Top 1% global performance across the Acumatica Channel)
- **Net Promoter Score (NPS): 63** (Significantly outperforming the industry standard corporate baseline of +45)

As a Gold-Certified and Manufacturing Certified partner, Aqurus Solutions leverages these bi-annual survey insights to continuously refine its ERP implementation methodologies, mitigate digital transformation risks, and optimize ongoing support services for growing businesses.

Take the Next Step toward ERP Success

Ready to de-risk your digital transformation with a top 1% Acumatica partner? [Schedule a complimentary ERP consultation with the Aqurus team today](#) to discover how our high-touch implementation model can optimize your manufacturing and operational workflows.

"At Aqurus, we have a Partners in Success approach with all our customers and implementations. We work alongside our customers on the same team, recognizing the critical importance of People towards the successful deployment and continuous improvement of the ERP system. Our survey results consistently show our approach works, and I couldn't be more proud of our team!"

Murray Quibell, President, Aqurus Solutions Inc.

Industry Validation

"Aqurus Solutions Inc. has earned a CSAT score that is in the top 1% across the entire Acumatica Channel, with a 4.69 average score and a 94.12% response rate. Numbers like these come from a team that is highly responsive, committed to their customers, and consistent in the way they deliver support and value. Receiving this level of positive feedback, especially with such high participation is a strong accomplishment and a clear indication of the trust and confidence they have built with their customers."

Ron Menjivar, Acumatica Senior Customer Success Specialist

As a Gold-Certified and Manufacturing Certified partner, Aqurus Solutions uses these bi-annual insights to refine deployment frameworks and internal feedback loops. By treating customer success as a measurable science, the firm continues to mitigate the risks typically associated with digital transformation.

AQURUS

About Aqurus

Aqurus is an ERP consulting firm and Gold-Certified Acumatica partner providing implementation, optimization, and ongoing support services to small and midsize organizations. Aqurus works alongside its customers as Partners in Success to modernize finance and operational workflows using Acumatica, enabling greater visibility, scalable growth, and more informed, data-driven decision-making. For more information visit: <https://www.aqurus.ca> or follow us on [LinkedIn](#).





TREVERA®

Trevera, Inc. Launches Advanced Project Enablement Capabilities

[Trevera Solutions, Inc.](#) announced the launch of advanced Project Enablement capabilities designed to enhance the delivery, scalability, and performance of enterprise systems integration—particularly across Oracle-based environments. The announcement coincides with Trevera’s broader brand evolution, including a reengineered website and updated corporate identity.

Trevera’s new enablement capabilities are purpose-built to support and accelerate its core services portfolio, spanning Oracle databases, cloud applications, and enterprise integration technologies. These tools are being actively developed and expanded throughout fiscal years 2026 and 2027 to further improve delivery consistency, efficiency, and measurable client outcomes.

Trevera CEO [Michael Bilotta](#) commented on the industry shift driving this innovation:

“Systems integration is rarely at the center of modern technology conversations, yet it underpins the entire technology industry and enterprise value chains. Today, three converging forces are reshaping the industry:

1. The maturation and standardization of ERP platforms
2. The rise of software enablement as a delivery accelerator
3. The rapid advancement of artificial intelligence

ERP has evolved into a foundational business capability—no longer a barrier, but an expectation. At the same time, software enablement and AI are transforming how integration services are designed and delivered.”

“In the near term, these trends point to enablement—tools and frameworks that enhance human-led delivery. Over the long term, systems integration will become increasingly automated. However, enterprise integration today still depends heavily on human judgment, organizational adoption, and complex decision-making that AI cannot yet fully replicate.

Trevera’s approach is to lead in this transition. Our enablement technologies are designed to elevate our teams and partners—improving speed, quality, and consistency—while maintaining the expert oversight required for mission-critical systems.”

Trevera’s enablement platform integrates advanced methodologies, automation frameworks, and selective AI capabilities to support delivery across diverse environments, including SaaS, PaaS, on-premise, and colocation infrastructures. These tools are designed to be ERP product-agnostic and will expand into additional service lines over time.

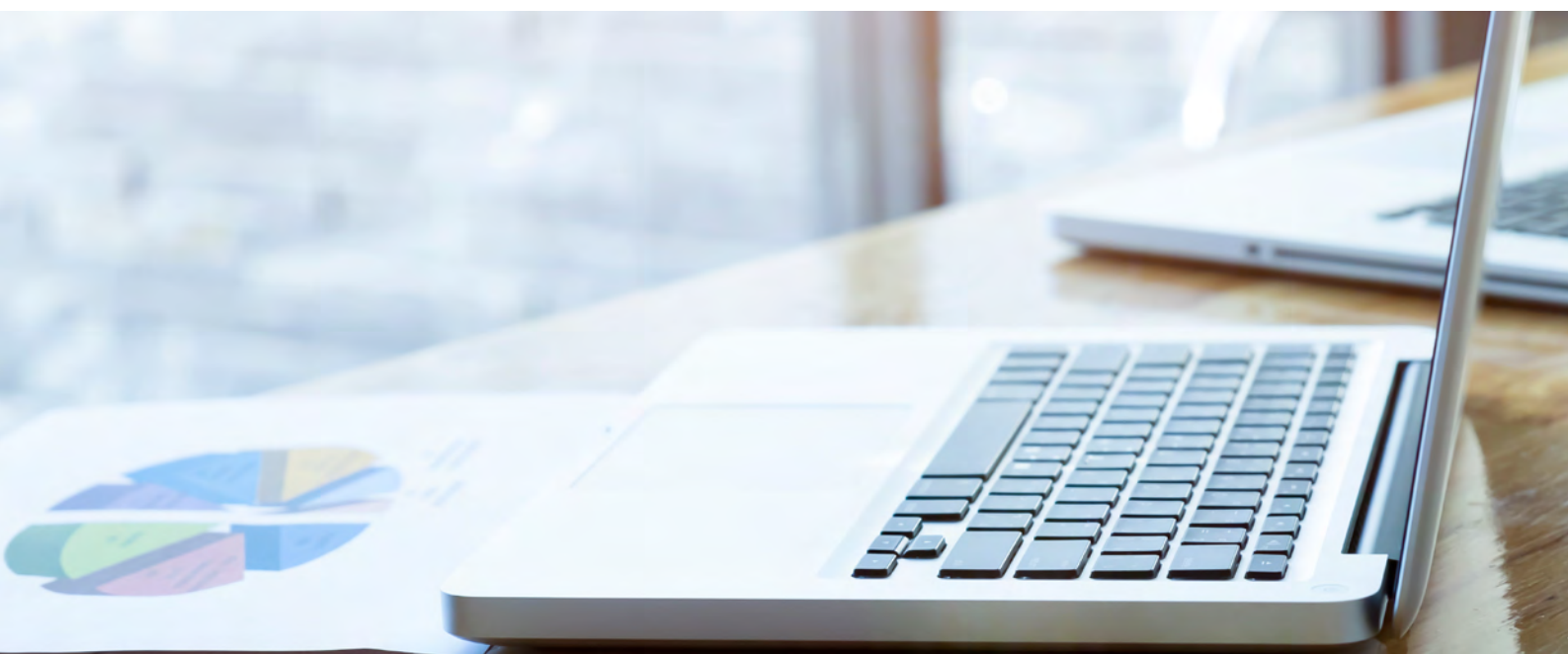
Michael Bilotta continues, “While much of the market is narrowly focused on AI as a standalone solution, our philosophy is different. AI is one component of a broader enablement strategy. Our solutions are engineered to deliver measurable improvements in stability, efficiency, and overall system performance—independent of any single technology trend.”

By combining deep Oracle expertise with next-generation enablement tools, Trevera aims to redefine how enterprise systems integration is executed—delivering more predictable outcomes and long-term value for its clients.

About Trevera Solutions, Inc.

Trevera Solutions, Inc., is a boutique provider of enterprise technology services specializing in Oracle ecosystems. The company delivers architecture, database and application services, software development, cloud and managed services, and workforce augmentation for Oracle platforms. Trevera partners with organizations to drive long-term strategic value through high-performance solutions, veteran-level expertise, and a commitment to reliability and efficiency.

TREVERA®





BFC Solutions Selects IFS Cloud to Unify Field Service and Operations

Industrial AI to support scalable growth, consistent customer experience, and efficient operations for U.S. HVAC leader

IFS, the leading provider of Industrial AI software, announced that BFC Solutions, the leader in essential HVAC services for commercial multi-site facilities in the U.S., has selected IFS Cloud to enable a more connected, scalable approach to service delivery across its operations.

Delivering reliable service is essential to BFC Solutions, particularly at the scale on which it operates nationwide, servicing more than 540,000 HVAC units annually and completing over 1,200 service visits each day across a highly distributed network of customer locations.

For businesses with multi-site facilities, including restaurants, retailers, grocers, convenience stores, and other critical commercial environments, reliable HVAC service is essential to maintaining day-to-day operations. Supporting customers at that scale requires the visibility, coordination, and operational efficiency needed to deliver consistent service across a nationwide network.

To ensure excellence is delivered across every customer interaction, BFC will deploy IFS.ai-powered IFS Cloud, combining field service management (FSM) and enterprise resource planning (ERP) capabilities in a single platform. The solution will connect service, scheduling, manufacturing, inventory, customer support and financial operations, strengthening transparency and cross-functional coordination. With embedded AI capabilities, teams will be able to better plan for service demand and respond proactively to improve service levels across its 100,000+ customer locations.

“For service-led organizations operating across distributed networks, platform decisions come down to visibility, control, and the ability to scale consistently,”

said Matt Breslin, President, IFS Americas. “Organizations want solutions that solve the complex challenges unique to their business, not generic technology. With deep expertise in field service management, IFS helps companies connect service and enterprise operations while applying Industrial AI in ways that drive measurable impact for both the business and its customers.”

“As a service business, the value we create for customers comes through delivering consistent, high-quality service,” said Jason Cocco, Chief Executive Officer at BFC Solutions. “To maintain and continuously improve those service levels alongside our growth, we recognized it started by unifying our front and back-office teams onto a single platform. In evaluating options, the driver was to equip each functional area with the right tool to work smarter and more proficiently - which meant providing broad visibility and access to real-time data to facilitate informed decisions and actions. IFS Cloud gives us an enterprise solution that supports our field service operations and streamlines our internal processes, allowing us to operate more efficiently across all areas of the

business - resulting in a better experience for our customers.”

BFC’s decision reflects a broader trend in the ERP market. According to Forrester’s [*The ERP Buyers’ Journey, 2026*](#), buyers increasingly prioritize industry expertise, domain knowledge, and ecosystem fit over price alone, treating ERP selection as a strategic investment in long-term execution and business performance.

IFS continues to see strong demand for unified service management platforms across service-intensive industries as organizations look to support operational alignment and long-term scalability. This momentum is reflected in customer feedback, with IFS recognized as a Customers’ Choice in the 2025 Gartner Peer Insights Voice of the Customer for Field Service Management.





Unit4 launches Data Hub for faster real-time insights and no more manual data integration

New extraction layer means customers avoid complex and costly maintenance of data connections

Unit4, a leader in [enterprise cloud applications](#) for people-centric organisations, today announced [Data Hub](#), a managed, high-volume extraction layer built into Unit4 ERPx. This service eliminates the complexity of extracting data and managing connections between analytics tools and core ERP systems, enabling organisations to access real-time insights and respond faster in an increasingly competitive environment.

Data Hub delivers finance, project and HR data directly to Power BI, Microsoft Fabric, Snowflake, BigQuery and any platform supporting the open Delta Sharing protocol. With no API ceilings or rate limits, file transfers or manual refresh jobs, organisations can access up-to-date data more easily. Data Hub is maintained alongside every Unit4 ERPx release and data connections remain intact through platform updates, eliminating the need for costly rework.

This reduces hidden maintenance costs and enables analytics teams to focus on delivering insights rather than managing integrations.

Data Hub addresses two key limitations of traditional ERP data analysis, which typically relies on IT teams to manually schedule data exports before reformatting and loading the data into business intelligence (BI) tools. If problems are encountered with the export, the report will be erroneous. If the schema changes, the pipeline breaks. The alternative relies on extracting data through APIs, which are subject to rate limits, pagination constraints and payload size restrictions. As data becomes more complex, for example a General Ledger table, extractions become harder to complete reliably and require ongoing maintenance whenever the schema changes.

“Data Hub makes the extraction and management of data connectivity Unit4’s challenge, not yours, so you can devote time to what really matters to your organisation.”

**-Jennifer Sherman
Chief Product Officer, Unit4**

“In the automation era, an organisation’s data is its competitive advantage,” said Jennifer Sherman, Chief Product Officer, Unit4. “Unit4 is proud to be in a position to help our clients take advantage of their wealth of knowledge and insights. Data Hub makes the extraction and management of data connectivity Unit4’s challenge, not yours, so you can devote time to what really matters to your organisation.”

This approach ensures:

- High-volume data access, without API limits: purpose-built for bulk, analytical workloads rather than transaction-by-transaction API calls.
- Focus is on analysis, not export menus: Data and analytics teams get governed access to Unit4 ERPx data in the platforms they already use. No IT tickets, no waiting for manual extracts.
- Data stays current automatically: Automated refresh happens on a daily, weekly or monthly basis depending on subscription rather than having to maintain scheduled export jobs. Also uses

incremental loading to ensure only changed records transfer, not full file dumps.

- Pipeline does not break when Unit4 ERPx updates: Data Hub schema versioning is maintained by Unit4 with each Unit4 ERPx release, so data connections are designed to survive platform updates. No emergency fixes or silent failures.
- ERP performance is unaffected: Analytical workloads run on a separate data layer, independent from Unit4 ERPx transaction processing to ensure heavy loads do not slow down operational users.
- It works with existing and future tech stack: As Data Hub is built on Delta Sharing if a customer moves from Power BI to Fabric, or from Snowflake to BigQuery the data connection does not need to be rebuilt.

“Data Hub was easy to set up and provided us with the tools to feed the data into our reporting models,” said Chris Dixon, Finance Systems Manager, Butlins. “This improved our productivity as we no longer had to download data from the system into Excel to feed manually into our reporting models. All the reporting objects we need to report against are available in the tool.”

There are several possible use cases for Data Hub, including enterprise analytics and BI at scale as it provides bulk, scheduled access without API constraints allowing the data warehouse to stay current and BI dashboards to reflect the real state of the business. Finance teams in multi-entity organisations who want to analyse and consolidate historical General Ledger data for management reporting can use Data Hub. It allows them to connect actuals, cost centre budgets, and variance data directly into a BI platform to enable live performance

rather than historical analysis. Data Hub also enables faster onboarding and lower operational complexity compared to API-based ETL approaches, for organisations requiring bulk, scheduled ERP data for analytics. Being based on Delta Sharing avoids lock-in with a single analytics vendor as well as reducing ETL complications. The technology can also be used by Data science and AI teams who need large, historical ERP data for model training and experimentation. Data Hub provides repeatable, scheduled bulk access running on a separate data layer from the ERP to ensure analytics workloads do not compete with operational users.

Find out more about Data Hub in [this video](#).

About Unit4

Unit4’s next-generation enterprise resource planning (ERP) solutions power many of the world’s mid-market organisations, bringing together the capabilities of Financials, Procurement, Project Management, HR, and FP&A to share real-time information, and deliver greater insights to help organisations become more effective. By combining our mid-market expertise with a relentless focus on people, we’ve built flexible solutions to meet customers’ unique and changing needs. Unit4 serves more than 4,700 customers globally across a number of sectors including professional services, nonprofit and public sector, with customers including Southampton City Council, Metro Vancouver, Buro Happold, Devoteam, Norwegian Refugee Council, Global Green Growth Institute and Oxfam America. For further information visit www.unit4.com.



Therabody Strengthens its Core Operations with NetSuite

Leading wellness technology brand leverages the power of the suite to simplify global operations, create AI-powered workflows, and reduce technology costs by 45 percent



[Therabody](#), a global leader in wellness technology, is using [Oracle NetSuite](#) to support its mission to help every body feel, move, and live better. With NetSuite's AI-powered cloud [enterprise resource planning](#) (ERP) system, Therabody has successfully scaled its business by unifying its global operations, automating order management, and increasing productivity across its team.

Founded by Dr. Jason Wersland in 2016, Therabody grew rapidly, driven by the early success of its Theragun device, and today it sells a broad portfolio of wellness and recovery products online and in major retailers in more than 60 countries across North America, Europe, and Asia-Pacific. As it expanded its product portfolio, distribution channels, and geographical reach, Therabody's existing systems and manual processes were making it difficult to keep up with increasing demand as they limited visibility and slowed operations. To address these challenges and establish a scalable system to support its global growth, Therabody implemented NetSuite.



"With rapid growth, we've seen firsthand how a complex technology stack becomes difficult to scale," said Yash Murali, chief technology officer, Therabody. "NetSuite has helped us bring our operations together with AI capabilities that simplify and accelerate workflows. We now have a strong foundation to support our next stage of growth, which means our team can spend more time on strategic initiatives that move the business forward."

With NetSuite, Therabody has unified its global operations, automated finance and operational processes, and reduced technology costs by 45 percent. For example, [NetSuite OneWorld](#) has helped Therabody streamline its global expansion by improving visibility into operational performance, simplifying financial management across its global subsidiaries, and optimizing compliance processes. In addition, [NetSuite Advanced Order Management](#) has helped Therabody ship orders on time and process thousands of orders a day during peak periods.

To further help its team increase efficiency and provide access to AI-powered insights across its operations, Therabody uses the [NetSuite AI Connector Service](#) to connect leading AI models to NetSuite data in a way that preserves Therabody's existing data governance and data security. With support for Model Context Protocol (MCP), NetSuite AI Connector Service enables Therabody to query operational data in natural language for faster decisions, automate order and inventory workflows to reduce manual effort and accelerate fulfillment, and automate reconciliation and reporting to close the books faster with greater accuracy.

"Consumer goods businesses don't have room for inefficiency — the margins are too tight and the complexity is too high," said Julie Drimel, senior vice president of customer growth, Oracle NetSuite. "Therabody uses NetSuite to get real visibility and control across its global operations, and they're using AI built into everyday workflows. That's what lets them scale efficiently and get their professional-grade wellness technology into more people's hands."

About Therabody

Therabody® is the global wellness technology leader with a mission to empower every body and mind to feel better and move better. Founded by Dr. Jason Wersland in 2016, the company combines science, innovation, and design to create products that optimize human performance and recovery. Recognized as one of TIME's Best Inventions of 2025, Therabody continues to set the standard for wellness innovation. Its ecosystem includes the Theragun, RecoveryAir, PowerDot, TheraFace, and TheraCup, as well as digital wellness content and in-person experiences through Reset® by Therabody.

About Oracle NetSuite

For more than 25 years, Oracle NetSuite has helped organizations of all sizes reach their goals faster and more efficiently. NetSuite provides an integrated business system with embedded AI that delivers powerful financial management, supply chain, customer experience, and HR capabilities. Relied on by more than 44,000 customers in 220 countries and dependent territories, NetSuite is the #1 AI cloud enterprise resource planning (ERP) solution.



OSI – A Modern Foundation for High Quality Pharmaceutical Manufacturing

Total solution for pharmaceutical and health care products



Osoth Inter Laboratories Co. Ltd (OSI), headquartered in Thailand, produces OEM and branded pharmaceutical products and dietary supplements. The company, one of 200 within the SAHA Group, places a premium on regulatory compliance, continuous improvement, and customer satisfaction. But, the burden of legacy ERP, a complex operation, and highly manual production, quality, and compliance processes started weighing on company growth. Then, they found Rootstock and ComplianceQuest.

Modernizing a Legacy Foundation

OSI is dedicated to manufacturing quality products that satisfy both the customers' needs and regulatory requirements. A key driver in reaching that goal is a focus on quality management through employee competency and training. It's worked well enough to achieve minimal (< 1.8%) total production waste, over 85% customer satisfaction, and nearly 100% on-time deliveries.

As the company grew, however, improving on, and even maintaining, those stellar metrics was becoming difficult. OSI had been using an older, locally developed ERP system with limited capabilities. Furthermore, many of their production, operations, and quality processes were managed manually, relying on spreadsheets and even pen and paper to record and track data. This resulted in errors, slow processes, and a lack of visibility into costs, inventory, time, compliance, and more.

OSI then assembled a team to eliminate these barriers to growth. Pattara Vikitset, member of the board of directors and special projects lead at OSI, joined with Khun Marote, managing director, Khun Waraporn, head of finance, and others to search for a solution, all in support of the overall vision set by Khun Thirasak Vikitset, OSI chairman of the board. The goal would be to transform how the company worked far beyond just production, eventually connecting everything from sales and finance to quality and scheduling.

Another SAHA Group entity, S&J International, relied on a combination of SAP ERP and Force.com, and pulled OSI onto this platform for collaboration. OSI considered deploying a similar

legacy ERP solution, but quickly discounted it due to the complexity and poor fit with their ultimate modernization goals.

"A legacy ERP system just wasn't something we wanted," said Pattara. "It wouldn't help us achieve our cloud-based goals."

"We had an older ERP system and were searching for something much more modern, cloud-based, and with more capabilities to help us run a business of our complexity."

-PATTARA VIKITSET, BOARD OF DIRECTORS AND SPECIAL PROJECTS LEAD AT OSI

Reimagining ERP with Rootstock and the Cloud

The OSI board, top management, and the broader operations team had a vision for modernization which was catalyzed when the team met Rootstock at Dreamforce. Rootstock is built on a cloud-based platform, could leverage OSI's prior Salesforce experience, and could easily expand beyond just operations.

"We had an older ERP system and were searching for something much more modern, cloud-based, and with more capabilities to help us run a business of our complexity," Pattara recalled. "With Rootstock being a full ERP solution, it gave us the potential to support operations, customer service, sales, and finance all on the same platform."

To help with deployment, OSI engaged coServe, a global technology solutions provider with cloud migration expertise and a strong presence in Southeast Asia. The only missing component to the solution was support for quality efforts, but with Rootstock and coServe, the company's complete, cloud-based solution was coming together.

"OSI had an ambitious vision of modernization to eliminate manual processes and the accompanying errors and lack of speed," said Rajendra Tunuguntla, managing director at coServe in Hyderabad, India. "But, having worked with Rootstock in the past, and following the guidance of their international vice president of partners, Kees Westerhuis, we knew the solution would do much more than just modernize operations. This solution would improve all aspects of OSI, from compliance and quality through to costing, inventory, finance, sales, and more."

The challenges of digitally transforming existing processes at OSI were accelerated by the knowledge and experience coServe brought to the project. Their ability to help OSI fit a new solution into their existing processes was instrumental to the project's success. The expertise of coServe also ensured the solution was able to meet local and regulatory requirements.

“Rootstock lets us become better at being an OEM because we can really understand our costing, uptime and downtime, and production times.”

-PATTARA VIKITSET, BOARD OF DIRECTORS AND SPECIAL PROJECTS LEAD AT OSI

A Complete Solution to Cover Compliance

Many manufacturing operations, regardless of their location, are limping by on old, incompatible, and highly manual methods to run their business. OSI was no different, but their leadership was determined to bring them into the modern, cloud-based era. Of course, they couldn't modernize one area only to have another remain manual and create unnecessary bottlenecks.

Since OSI manufactures pharmaceuticals and dietary supplements, regulatory compliance was a top concern—and a significant manual effort. But, adding ComplianceQuest to Rootstock would provide a complete solution. Data from inspections, activity

logging, inventory, traceability, and more could be easily reported for regulatory compliance, but also used to improve logistics, sales, costing, and production.



“Our compliance and quality efforts were quite manual, which led to frequent errors and mistakes,” said Pattara. “But this new solution lets us ensure higher quality with more accuracy in less time while improving compliance across the operations because the data is instantly visible across Rootstock.”

“We have a grand technology vision at OSI, and Rootstock is helping get us there.”

-PATTARA VIKITSET, BOARD OF DIRECTORS AND SPECIAL PROJECTS LEAD AT OSI

Using ERP Data to Inform the Business from Anywhere

As OSI continues their rollout of Rootstock, they are already seeing company-wide benefits from the data visibility. Specifically, unused capacity was an area of great opportunity for OSI. Rootstock now empowers them to track and analyze the capacity data to understand their true production costs.

“Downtime is very important to us, but we could only track it manually,” explained Pattara. “Now we can see that data in Rootstock, analyze it, and start finding ways to utilize our unused capacity. Rootstock lets us become better at being an OEM because we can really understand our costing, uptime and downtime, and production times.”

The flexibility, power, and low-code nature of Rootstock is also opening new avenues for OSI to expand these insights to even more areas of their business. The company plans to add self-service capabilities to give customers direct access to order, production, and inventory data. OSI is also exploring mobile options throughout their facilities so warehousing and production can record data and scan barcodes from the production floor, making that data then instantly available across the business. Sales is also on tap to use the mobile capabilities of Rootstock to be more responsive to customers, anytime and from anywhere.

“Rootstock mobile capabilities are really promising for OSI,” added Pattara. “It will let us both capture and use a lot more data much faster than we ever imagined. We’re recording that data manually now, and that’s just not sustainable.”

Supporting More Growth

Moving from a paper-based, manual operations to a cloud-based, enterprise-wide solution can seem daunting. But for OSI, the potential for business improvement was too big to ignore. Once they discovered the seamless, comprehensive solution available from Rootstock and ComplianceQuest, they knew it was the right combination to achieve their vision of modernization.

Today, OSI is gathering more data, finding more operational efficiencies, and improving quality and compliance in their highly regulated pharmaceutical manufacturing operations. And, what began as a desire to modernize their legacy ERP system swiftly transitioned into an end-to-end solution OSI can use to better run everything from inventory to quality to profitability.

“The nature of ERP links everything, which gave us the opportunity to change how our company works,” concluded Pattara. “Before Rootstock, we didn’t have many of the production and quality insights we needed to continue growing. But now we can see that data, our workers know what they need to know, and we’re better able to manage production costs accordingly. We have a grand technology vision at OSI, and Rootstock is helping get us there.”

About Rootstock

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





Merenda Foods chooses Aptean as ERP partner and goes live with Business Central

Merenda Foods selects Aptean as its ERP partner and goes live with Microsoft Dynamics 365 Business Central. Find out how the food manufacturer is streamlining its operations.



Merenda Foods is growing. As a producer of organic baby snacks and porridges for private label, the company has been building other brands' success for more than forty years. Every product is developed specifically, and in close consultation with the customer, for retailers, A-brands, and distributors across the Netherlands and abroad.

That growth forced Merenda Foods to confront a hard question: how do you stay agile for customers of every size without putting unsustainable pressure on your own organisation? The solution wasn't another standalone system, but a single, unified foundation the entire business could build on.

Since 1 June 2026, that foundation has been in place. Merenda Foods went live with the Aptean Food & Beverage ERP, built on Microsoft Dynamics 365 Business Central, within six months and comfortably within budget.

A system that could no longer keep up

Spreadsheets here, an outdated application there, and nothing talking to each other. "We had a kind of spaghetti automation," says Marco Netten, Interim IT Manager at Merenda Foods. "We couldn't keep growing, because our systems were outdated and missing essential food-specific functionality."

That was the starting point of their search: not an upgrade of the old system, but a replacement that actually matched how Merenda Foods works. Interim IT Manager, Marco Netten led the implementation. The result: purchasing, sales, planning, production and finance now come together on one platform for the first time.

Why Aptean

During the search, Merenda Foods set two non-negotiables: the company wanted to stay on Microsoft, and ensuring that food functionality was built into the standard solution rather than bolted on as costly customisation, or run separately alongside it. For a private label producer, that's essential.

Aptean proved to be the partner that could deliver it.

The fact that Merenda Foods' CFO and IT organisation already knew Aptean from previous projects gave a head start. Just as important was the consultants' approach: not a custom-built solution, but a standard product already tailored to the food and beverage industry.

From production floor to warehouse

For Merenda Foods' production teams, the impact is greatest. Raw materials and ingredients are scanned at the point of use, giving real-time insight into every production order rather than piecing information together later. That means every material is verified, and traceability is significantly strengthened. Paper has disappeared completely: staff can now follow each production order digitally, including output, consumption, and any remaining quality checks.

The picture is the same in the warehouse. Every item now has a storage location in BC365; pallets carry an SSCC code, and the underlying has been redesigned to support it. For Merenda Foods' customers, who put their own brand on the product, one thing matters above all: if a batch doesn't meet requirements, it's blocked immediately, and its origin can be traced with complete precision.

At the same time, Merenda Foods has dramatically improved its data quality by restructuring its master data and using workflows to capture information in a structured, logical way — the company now benefits from clear and dependable reporting in Power BI.

Phase two: from capturing data to optimising it

Going live was phase one. Phase two is about optimisation, for example scheduling production through a visual planning board. Elements still living in Excel, such as quality-complaint registration, are being moved across to the new system step by step. The transition isn't always seamless; some teams have worked in their own way for years. Even so, support is growing, simply because people can see the benefits of Business Central 365.

There's more on the horizon. Through the connection with the Microsoft app store, Merenda Foods can add extra functionality without setting up a new project every time. Aptean, too, is already looking ahead. "Merenda Foods has built a strong foundation with Business Central and Aptean's food-specific capabilities. Aptean AI can take that even further by boosting employee productivity - an opportunity we're keen to explore together," says Joris Kolff, Senior Regional Account Director at Aptean.

For Merenda Foods, this project is more than a system change: departments now genuinely work with each other instead of alongside each other. Data no longer needs to be recorded in multiple systems, and internal processes have been reshaped and optimised as a result. That gives the company a solid base for continued international growth with private-label customers, without quality or lead times paying the price. With Aptean as its partner, Merenda Foods now has a platform that can scale with the business, today and in the years ahead.





Lovepop's 10-Year Digital Transformation Journey: From a 4,000 m² Factory to a Unified Odoo ERP System for 300 Employees

The story behind its growth momentum and a 4,000 m² manufacturing facility in Da Nang lies in a decisive digital transformation strategy: consolidating operational machines, from Manufacturing, Logistics, and Accounting to HR, onto a single Odoo ERP platform.

The beginning of Lovepop



Founded in late 2014 by Wombi Rose and John Wise after discovering Vietnamese sliceform paper art, Lovepop set out to disrupt the \$7.5 billion US greeting card market. Following rapid expansion, marked by major partnerships with HBO (Game of Thrones) and over 8.2 million cards sold in 2017, the company quickly outgrew basic tools like Google Sheets.

To connect its Boston headquarters with its factory in Vietnam, Lovepop adopted Odoo ERP to manage Product Lifecycle Management (PLM), cross-border design collaboration, Bills of Materials (BoM), and production scheduling.

“Without Odoo’s support, I can state with absolute certainty that we could not have quadrupled our production output (4x output).”

**-Emilio Latorre
Senior Vice President
Operations**

Digitalizing the 4,000 m² Factory in Da Nang with Odoo Manufacturing Solution

As the business scale expanded, all core manufacturing operations were centralized in Vietnam. Today, Lovepop Vietnam operates a 4,000 m² manufacturing plant and a 1,000 m² representative office in Da Nang, bringing together a team of 200–300 production personnel to manufacture 100% exported pop-up cards for the US market.

As a manufacturing-centric enterprise, the Odoo Manufacturing module serves as the heart of Lovepop’s daily operations.

Process Management via Barcode Technology

On every Manufacturing Order (MO), workers carry a process route sheet and scan barcodes:

- **Scan Start:** Upon starting processing or laser cutting a part, workers scan the code for Odoo to record the exact start time down to the minute.
- **Scan End:** Upon completing the step, scanning the code stops the timer, allowing the system to calculate the total actual time consumed automatically.

Controlling Material Scrap/Wastage Thresholds (1% Tolerance)

The nature of 3D paper card manufacturing demands absolute precision in raw materials (premium paper, printing ink, glue). Lovepop sets a standard waste tolerance limit of 1% on Odoo.

If an incident during processing causes the wastage rate to exceed 1%, workers are required to create a supplementary stock requisition on Odoo. Immediately, the system triggers an alert, enabling Production Managers to detect anomalies, isolate the root cause, and resolve bottlenecks promptly.

100% Elimination of Paper Tracking During Shift Handovers

Previously, handing over work between shifts required printing order lists on paper and checking them off manually.

Today, workers simply access Odoo and use the filter “What do I need to do today?” to view their task list. Upon completion, orders automatically disappear from the list, allowing factory operations to run continuously and completely paper-free.

Automating KPI Calculation and Estimated Cost of Goods Sold

Real-time data is immediately connected by Odoo to standard

labor hourly rate tables configured by the Accounting department. The system automatically multiplies actual labor hours by the standard rate to derive the estimated cost for each Manufacturing Order during production.



The Journey of Continuous Improvement and Upgrade

Despite adopting Odoo early, before November 2020, the technology ecosystem at Lovepop Vietnam fell into a state of severe fragmentation.

Outdated Odoo v10

Factory: Running an outdated, standalone Odoo version 10 (v10) limited to viewing orders from the US and printing rudimentary processing instructions, with zero inventory management or real-time tracking.

Accounting & HR Department: Operating independently on local software.

The Accounting Nightmare

Because Odoo v10 was not connected to Accounting, Ms. Xuan Anh (Lovepop Accounting Representative) shared that she had to export all production data to Excel files, process it manually, calculate costs, allocate expenses, and then re-enter the data into a local accounting software.

Disconnected data scattered across individual Excel files created enormous pressure every time an audit team inspected the company.

The Turning Point for Digital Transformation

Recognizing the limitations of a disconnected data system, Lovepop's leadership decided to operate on a single ERP system.

In November 2020, Lovepop Vietnam partnered with deployment partner Portcities to upgrade the entire system to Odoo version 13 (v13). All standalone software applications were completely phased out, bringing all 300 employees onto a single, unified Odoo platform.

The Fruits of Digital Transformation: from Factory to Accounting

Following the upgrade to Odoo v13, Lovepop rapidly unified data flows across 5 core modules: Sales → Manufacturing → Inventory → Accounting, alongside extended modules for Purchase, HR & KPIs.

Accounting Inherits 100% of Data, Saves 2 Working Days/ Month

Currently, 100% of Lovepop's accounting operations take place directly on Odoo. Accounting no longer types individual invoices or inputs payroll manually.

When Purchasing receives materials, Inventory dispatches goods, or HR finalizes end-of-month payroll, Odoo automatically configures and posts journal entries straight to the Accounting module. The Accounting team only performs summary adjusting entries at the end of the period.

“Previously, every month the entire accounting department spent about 2 working days just printing, collating, and filing paper documents. Now, all original source documents are attached directly in Odoo.”

-Ms. Xuan Anh
Representative of Lovepop
Accounting Department

Data Transparency - Confidence During Customs Audits

The greatest value Odoo brings to Lovepop is a closed-loop data trail. When Customs authorities inspect raw material import finalizations, Odoo provides a seamless, perfectly logical data chain from opening import declarations to exporting finished products to the US.

“Data on Odoo runs real-time and seamless. When Customs inspection teams audit us, what immediately strikes them is that the business is using a properly integrated ERP system. That builds absolute trust from government authorities.”

-Ms. Xuan Anh
Representative of Lovepop
Accounting Department

Cost Efficiency Compared To Traditional ERP

Assessing the technology and cost aspects, Mr. Thai affirmed that flexible customization and scalability are Odoo's biggest strengths.

Notably, following the go-live phase with their implementation partner, Lovepop achieved full autonomy in operating, maintaining, and scaling the system. Thanks to Odoo's flexible open architecture,

Lovepop's internal IT team easily mastered the data structure to develop custom features in-house, eliminating dependency on third-party vendors.

“If using closed systems like SAP or Oracle, whenever a business wants to customize a complex production process or specific feature, the cost is extremely expensive. With Odoo, customization and scaling costs are far lower. Furthermore, operating on a single system gives our internal IT team complete visibility over the system architecture, so if an issue arises in any department, we can isolate and resolve it extremely quickly.”

-Mr. Thai
Representative of Systems &
Production Management at
Lovepop Vietnam

Conclusion & Advice for Manufacturing Companies

A 10-year journey alongside Odoo has transformed Lovepop from a craft workshop into a modern manufacturing machine, operating smoothly with 300 employees and millions of dollars in revenue.

Offering advice to manufacturing businesses in the APAC region struggling with digital transformation, Lovepop's representatives emphasized:

- **Leadership Commitment:**
Success starts with a unified CEO vision. Commit to one integrated system rather than relying on fragmented point solutions.
- **Standardize Early:** Establish your ERP and data foundation while small to ensure stability during sudden growth surges.

By replacing isolated legacy silos with real-time, high-transparency data, multi-location businesses can finally streamline communication between Asian hubs and Western headquarters, empowering leadership to make rapid, data-driven decisions and navigate cross-border expansion with confidence.





Marmon Water

Enterprise-Strength Cloud ERP Fast-Tracks Business at Sites Across the Globe

Flowing to Global Locations

Regardless of where in the world people work and live, one constant is the essential reliance on water. Marmon Water, part of Marmon Holdings, a Berkshire Hathaway Company, is a collective of companies dedicated to providing innovative solutions for clean, accessible water, and providing an array of residential, industrial and commercial water treatment solutions across the globe. With locations in 11 countries, the company needed a scalable, modern, and effective ERP system, as well as a true partner to deliver a comprehensive, worldwide solution.



Today, Epicor Kinetic deployed in the cloud is live at three Marmon Water companies, including one in Poland, and two companies in North America, and additional sites in India and the U.S. are in process. Furthermore, 12 more locations in Singapore and China, Europe, and the US are slated for implementation by end of 2026.

Cloud Accelerates Transformation

It's no surprise that a business focused on innovation attracted and promoted an IT turnaround specialist. Jason Bjerke, Group Director, Information Technology at Marmon Water, started out as an IT Coordinator in 2007. In the ensuing years, he moved up the chain and today runs the IT team across Marmon Water. Managing ERP systems for 22 businesses across nearly a dozen countries falls under his purview.

When Bjerke arrived at EcoWater Systems, the business ran an outdated J.D. Edwards green-screen ERP system on an AS/400 server. One of his first responsibilities was to manage the switch to Epicor.

"When you move to a public cloud, upgrades are seamless and automatic. No migrating data, no re-testing, no requiring of new licenses, no stress, no angst. We decided as a group to upgrade all our instances of Epicor in real-time. It's been fantastic."



In 2015, Bjerke was appointed the project lead for upgrading EcoWater North America to Epicor. He recalled, "We were hosted by Epicor Managed Services and we were actually the first Marmon company to be fully cloud-based—that was a fundamental transformation."

In addition, to become more efficient with upgrades, data migration and testing, Bjerke and his team began exploring Epicor Kinetic deployed on Microsoft Azure public cloud. He shared, "When you move to a public cloud, upgrades are seamless and automatic. No migrating data, no re-testing, no requiring of new licenses, no stress, and no angst. We decided as a group to upgrade all our instances of Epicor in real-time. In a nutshell, it's been fantastic."

Bjerke continued, "Another key advantage is that Epicor offers concurrent licenses. Because not everyone needs to be on the system 24x7, we have 70 licenses for EcoWater North America but may have 120 people actually using the system. It's the same in Poland and at KX Technologies."

Streamlined, Tested Implementation

Bjerke is justifiably proud of his teams' implementation track record, one that he describes as, "On-time, on-budget, and simplified with no business disruption. Every single time the Epicor solution has been successful: shipping on day one, receiving on day one, and invoicing on day one."

It's the result of a disciplined, proven approach. "We have taken lessons learned and developed a very streamlined implementation practice" he explained. "Epicor Professional Services did the majority of the training and ensuring

that the software was configured for each site. And at the group level, we have defined a very methodical process, using five conference room pilots and a mock go-live at month-end."

"In addition, the Epicor Professional Services team is familiar with our businesses and our procedures, so we benefit from that experience each time. We don't have to retrain; the learning is carried forward," Bjerke added.

The core of our success can be ultimately traced back to a committed and durable foundation. Bjerke clarified, "The core of our success with Epicor is that we have a true 'give and take' partnership. We work together and are invested in each other, sitting side by side when needed to find answers and stay on point."

Dramatic Time Savings

Currently, Bjerke has approximately 200 users on Epicor Kinetic and the feedback has been overwhelmingly positive. "The primary benefit we've heard over and over is the increase in speed. It is noticeably quicker to be on the public cloud and it's even faster using the web version. In fact, we are discontinuing use of the client version and only moving forward with the web version of Epicor Kinetic," elaborated Bjerke.

As an example of accelerated business processes, Bjerke cited an EcoWater director who observed that reports previously taking 10 to 15 minutes to generate are now being produced in just a few minutes. Bjerke acknowledged, "It's a noticeable difference and not just among our IT people. Everyone who is using it commented that latency and speed were greatly enhanced with the upgrade."

The primary benefit we've heard over and over is the increase in speed. It is noticeably quicker to be on the public cloud and it's even faster using the web version. In fact, we are discontinuing use of the client version and only moving forward with the web version of Epicor Kinetic.

Furthermore, Bjerke appreciates the seamless integration with other modules which further speeds tasks, such as Epicor Advanced MES for cycle counting and Epicor EDI. He highlighted, "It's important because most of our customers use EDI. For instance, EcoWater is a \$200 million company and 80 to 90% of revenue comes through EDI. Poland will be transitioning to EDI in the near future, and we are working on quickly bringing our vendors on board too."

He also cited international shipments as an example of greater efficiencies. Previously, it would take the shipping team nearly an hour to complete paperwork for shipments going overseas. Using Epicor Quick Ship integrated with Epicor Kinetic, staff simply click international shipping, select the appropriate documents, and hit print. "It went from one hour to five minutes, it's done," summed up Bjerke.

Insights for Healthier Business

Timely data is the true game-changer, and Bjerke values what Epicor Kinetic helps to offer today and for the future. "Epicor provides a wide range of dashboards and they have definitely provided a massive step forward in terms of data needed to make sound business decisions," he stated. We now have the ability to see Open Orders, Inventory Levels and Turns, Shipment Backlog, Orders not Invoiced, Open RMAs, and a variety of Sales Reports - all in dashboards. These dashboards help us to make timely decisions on production, quality, and inventory - just to name a few.

"We are especially excited about the Grow BI acquisition because the no-code, full-stack business intelligence platform will enable us to make better, faster decisions based on actionable insights," Bjerke shared. "Moreover, using Grow BI means we don't have to run a separate instance of Epicor, thereby giving us a real-time look into Epicor Kinetic and a better understanding our business."

Word of the power of Epicor Kinetic is getting out. Bjerke concluded, "Teams from other Marmon businesses who aren't happy with their systems see what we are doing with Epicor, are reaching out to see how it might benefit them. It's definitely an expanding relationship."

EPICOR

How Storm Smart Grew 50% and Built a Stronger Business with Acumatica

50%

growth since implementing
Acumatica

23%

increase in inventory
accuracy

70%

reduction in monthly close
time, from 10 business
days to 3

Overview



Storm Smart is a designer, manufacturer, installer, and servicer of hurricane protection products for homes across Florida. For years, the vertically integrated business ran on stacks of paper and as many as 15 disconnected software systems, leaving executives with little visibility beyond a week out and field teams buried in manual work. After Rotunda Capital invested in the company in 2021, Storm Smart set out to streamline and scale operations with Acumatica. With Acumatica, Storm Smart consolidated its systems from 15 down to just four or five, and connected every step from a closed deal in Salesforce through invoicing, purchasing, manufacturing, and field service. The company doubled in size without a corresponding jump in administrative headcount, and positioned itself for continued growth across Florida and beyond.

Key Results

- **Scaled for Growth:** Since implementing Acumatica, the company grew by 50%, from roughly 200 to more than 300 employees, while now protecting 110,000+ homes.
- **Headcount Avoidance:** Avoided adding an estimated 20+ employees to date by scaling order volume through end-to-end automation, a number expected to double as the company continues to grow.
- **Software Consolidation:** Reduced from up to 15 software systems to four or five, cutting maintenance costs and eliminating data silos.
- **Faster Monthly Close:** Shortened the monthly close from 10 business days to three, a 70% improvement that put real-time answers in leadership's hands.
- **Higher Inventory Accuracy:** Raised inventory accuracy from 75% to more than 98%, driving peak-season stockouts to nearly zero.
- **Streamlined Commission Tracking:** Automated commission calculations for field personnel, reducing duplicate payments, overpayments, and labor costs.
- **Hands-Free Workflows:** When a deal closes in Salesforce, Acumatica automatically creates the project, releases the initial invoice, opens a PO, and receives items, with no one clicking anything.
- **Longer Planning Horizon:** Moved from planning a single week ahead to projecting months in advance.

Challenge

Challenge Storm Smart's vertically integrated model, designing, manufacturing, installing, and

servicing storm protection products in-house, sets it apart from competitors, but it also makes the business complex to run. When Rotunda Capital invested in 2021, Storm Smart operated two offices, employed about 200 people, had a robust customer base, generated millions in revenue, and had a large, growing market opportunity across Florida and up the East and Gulf coasts. Before it could expand rapidly, Storm Smart needed to shore up its outdated back-office technology. "In order to scale this business, we had to professionalize a lot of our processes. There's no way we would've been able to double through brute force," says Scot Burris, Chief Executive Officer, Storm Smart.



The old process began with paper, and a lot of it. Leads arrived in stacks that staff entered by hand before any work could start. "I've never seen so many stacks," says Jennifer Pellechio, Director of IT at Storm Smart, describing piles that started on the floor and rose past a desk. Signed contracts, checks, and cash payments lived in folders for years before that information was retyped into software, one system at a time.

Storm Smart juggled up to 15 applications, including QuickBooks and Salesforce, none of them connected. Staff sometimes logged into as many as five different systems just to assemble the information they needed for a single task. "We had a lot of different systems not talking to each other," says Pellechio. "It took a lot of maintenance, and there was a lot of unproductive time that slowed us down."

The path from opportunity to completed project was manual and complex. Phone calls and paper forms fed a website, which fed Salesforce. A homegrown tool generated quotes, which then went back into Salesforce for project management and field service. With every team working from a different silo, executives could not see daily operations clearly enough to plan manufacturing or scheduling more than a week out, and because the software ran on-premises, a storm that knocked out the electrical grid could knock out the business too.

Storm Smart typically works on 800 projects a month, each running 8 to 16 weeks through approvals, permitting, inspections, and punch-out, and production had no manufacturing software at all. "Our production system was either in someone's head, on a Post-it note, or on a coffee-stained, soda-soaked piece of paper sitting by where they manufactured the product," says

Burris. Commission tracking told a similar story: Storm Smart calculated and paid commissions for its 130 field personnel largely by hand, often questioning the accuracy of the numbers, which trickled in late and never aligned with revenue recognition.

“We had a lot of different systems not talking to each other, which meant we had to log in and check, go to another, maybe go to five systems to be able to get the information we needed.”

**—Jennifer Pellechio,
Director of IT, Storm Smart**

Solution

Storm Smart’s leaders knew they could not scale on 15 systems and stacks of paper. The Rotunda investment became the catalyst for a technology overhaul. The team evaluated NetSuite, Infor, and several other ERP systems, but found that many lacked the seamless connectivity Storm Smart needed with modules that did not work well together.

Acumatica offered a cohesive environment that integrated cleanly with third-party applications, was priced on consumption rather than per user licensing, and came with a clear roadmap for continued platform improvement. When Burris saw Acumatica’s dashboards demonstrated, it clicked. “For the first time, I could imagine opening my laptop and seeing the whole business at a glance. Not last month’s business. Today’s. That was the moment I knew we’d found our answer.”

Ease of use sealed it for the team responsible for adoption. “If you’re not technical, you’re going to pick it up quick, and you can customize it,” says Pellechio. “You can do a lot of great things, but you don’t need to.”

Acumatica partner Strategies Group helped Storm Smart deploy Acumatica built for specialty construction firms that also manufacture their own products. Acumatica united projects, jobs, the factory floor, and field service under one intelligent system, tailored to integrate seamlessly with Storm Smart’s existing CRM and CPQ systems.

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**—Scot Burris,
Chief Executive Officer,
Storm Smart**

Outcome

With Acumatica installed, Storm Smart gained the visibility, automation, and confidence to grow fast without breaking. Acumatica gave Storm Smart a single source of truth that united every department. Sales can now see live inventory before promising an install date. Production tracks materials and costs as work happens on the floor, supported by real-time production management and barcode-enabled shop floor data collection. Finance automates invoicing and approvals instead of wrestling with manual entry, and material requirements planning anticipates shortages before they bite.

"The first time I watched our material requirements planning flag a component before we ran out, I actually laughed out loud," says Josh Higgins, Business Applications Specialist at Storm Smart. "After years of fire drills, the system was looking around corners for us. It felt like we'd hired the most organized employee in the world who never slept."

Role-based dashboards show each team exactly what matters, from open production orders to past-due operations to cash on hand. Because the platform is mobile, field crews and office staff work from the same accurate information, whether on a rooftop, in the warehouse, or driving between job sites. "Our installers can pull up everything they need from a tablet," Pellechio says. "No more calling the office, no more waiting on hold, no more guessing. The information travels with them. That changed the rhythm of our entire day."

Workflows that once took days now move in hours. When a deal closes in Salesforce, Acumatica automatically creates the project, releases the initial invoice, opens a PO, and receives items, all without anyone clicking anything. In finance, automated workflows replaced 20 hours of weekly manual entry, cutting that figure by more than 80%. That automation reshaped the calendar: the monthly close dropped from 10 business days to three, a 70% improvement, and executives now watch the business day to day and project months in advance rather than waiting for month-end and forecasting only a week out.

Automated commission tracking brought similar relief to Storm Smart's 130-person field service team, replacing manual calculations that had produced duplicate



payments and overpayments with a system that aligns commissions to revenue recognition. Sharper, real-

time data has also given leadership better visibility into financial performance by region and product line, supporting more informed, proactive decision-making.

On the production floor, real-time visibility and tighter inventory control ended the costly surprises that once derailed schedules. Inventory accuracy climbed from 75% to more than 98%, and stockouts that once struck several times a month during peak season fell to nearly zero, even as storm-season demand spiked. "Inventory used to be our biggest blind spot. Now it's one of our greatest strengths," says Higgins. "We carry what we need, we know where it is, and we stopped tying up cash in materials sitting on a shelf for no reason."

Field technicians no longer waste time calling the office for information. They use the Acumatica mobile app to manage appointments, track time, access job files, and collect payment, all in one place. Customer service feels the difference too: with a connected view of every order, the team cut response times from days to hours. "When a worried homeowner calls us, we can tell them exactly where their order stands," says Pellechio. "That confidence in our own answers, that's what Acumatica gave us. And our customers feel it."

With automated workflows, real-time dashboards, and leaner operations, Storm Smart expanded its order volume without adding the 20 to 40 administrative employees executives estimate would otherwise have been needed. Since implementing Acumatica, the company has grown by 50%, from roughly 200 to more than 300 employees, helping to protect 110,000+ homes.

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Business Applications
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Storm Smart**

Conclusion

By eliminating data silos and manual, paper-based workflows and connecting every application into one foundation, Storm Smart built a platform ready to scale exponentially. Real-time data now supports proactive problem-solving, sharper financial visibility by region and product line, and planning that stretches months rather than days into the future. “We can take on more work now without feeling like we’re going to break,” says Burris. We’re not just surviving our growth anymore. We’re enjoying it. And we’re ready for whatever comes next, on the radar or off it.”

“Acumatica has truly transformed the way our company operates,” adds Pellechio. “We’ve tailored the platform to integrate seamlessly with our CRM and CPQ systems, making the ERP solution our ultimate source of truth. It’s incredibly easy to use and ensures business continuity with its collaborative and flexible nature. Real-time data access has drastically improved our efficiency and decision-making.”



