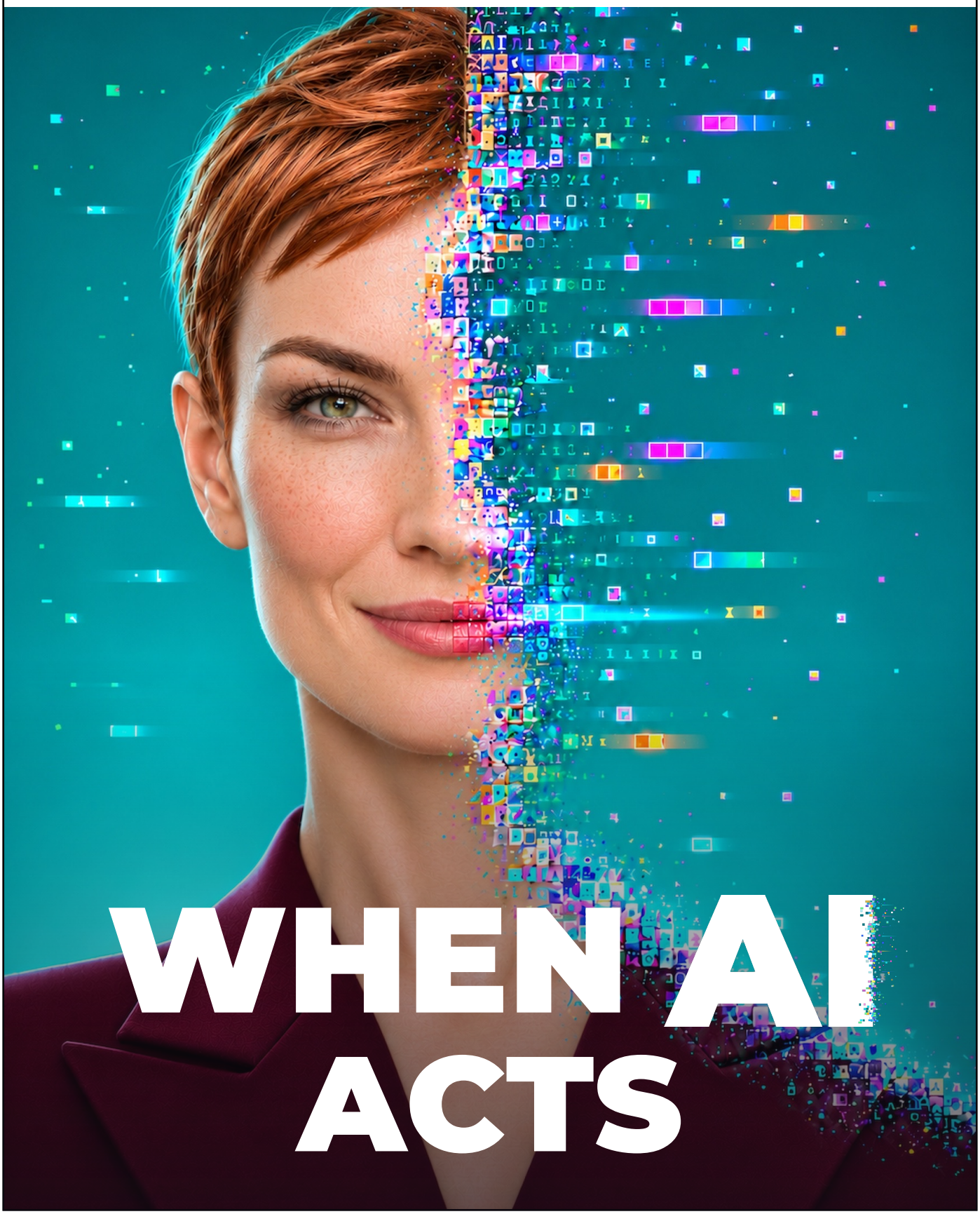
ERP NEWS

MAGAZINE

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# WHEN AI ACTS

# EDITOR'S NOTE

## WHEN AI MOVES FROM ANSWERS TO ACTIONS




Dear Readers,

When a supplier is running late, a buyer can ask Claude which production orders are at risk, review the options and approve a change in Infor M3. It raises the question at the heart of this issue. How much authority should an AI assistant have inside an ERP system?

In our Executive Q&A, Scott Grillo of WilliamsMarston discusses the choices CFOs face during a NetSuite implementation and after go-live. He explains how finance leaders can use measures such as the time it takes to close the books to assess the value of later improvements.

PairSoft's Vijay Vidiyala takes us into accounts payable and procurement. He discusses how agents can investigate invoice exceptions and prepare payment runs, and how companies can keep those steps traceable. He also explains how early maintenance warnings can inform purchasing and help finance track spending by asset.

France's cybersecurity agency, ANSSI, considers who sets those limits. Its guidance asks companies to define what agents can do on their own and which actions need human approval.

Databricks Genie shows how employees can query selected SAP ERP data in ChatGPT under existing access permissions. At Brennan Industries, developers use Claude Code and Codex to build custom workflows that run inside NetSuite.

In another customer story, Spain's Julian Soler uses Abas ERP to rank grape recipes by cost and fit with customer specifications. We also cover Gartner's separate cloud ERP assessments for service-centric and product-centric enterprises.

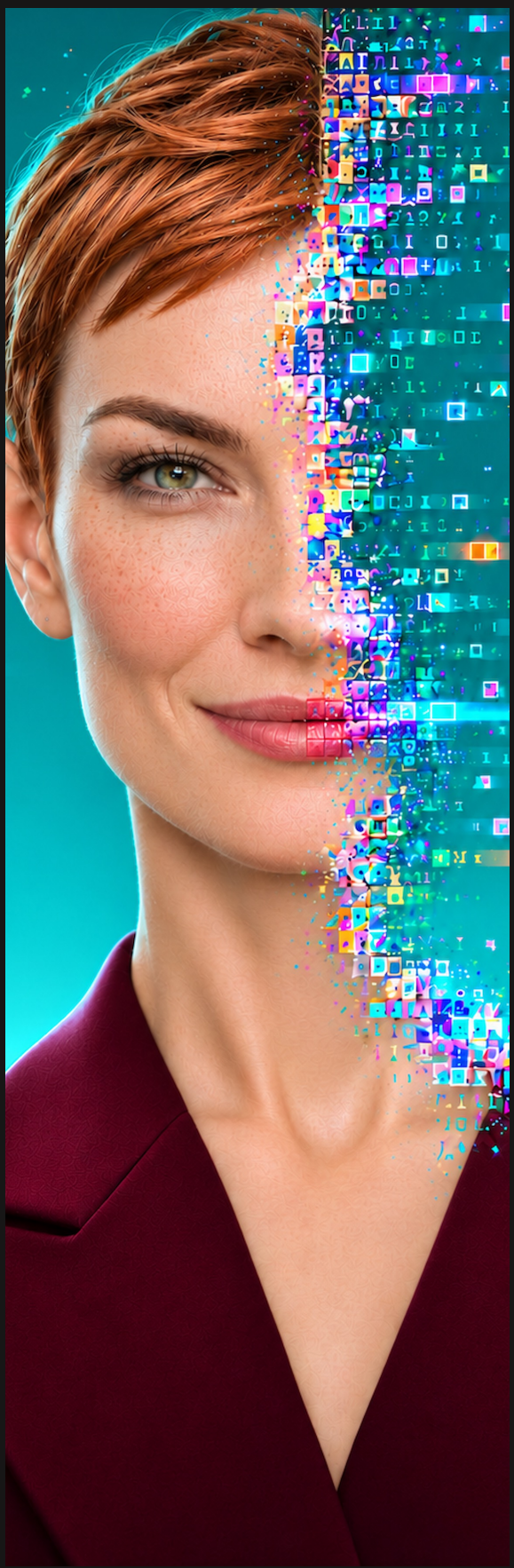
Enjoy the issue.

**PINAR SENGUL**
Editor-in-Chief, ERP News

pinar@erpnews.com

# When AI acts

## Where people have the final say



Suppose a production planner asks an AI assistant to bring a supplier delivery forward by a week. The earlier shipment could keep a line running, but it could also incur an express freight charge. Who can approve that cost?

Selected Infor Velocity Suite customers can already use Claude to investigate delays, review options and approve supported changes to orders in Infor M3. The system applies the signed-in user's permissions when it runs the transaction.

In the planner's scenario, the assistant could identify the production orders that depend on the parts and prepare a change for review. If company policy requires approval above a freight threshold, the reviewer can weigh the charge against the cost of stopping the line.

That decision should be traceable in ERP. The next person to open the order should see what the assistant proposed, who authorised the change and which delivery date the buyer confirmed with the supplier.

# CONTENTS


03 COVER STORY

## WHEN AI ACTS

Where people have the final say



02 **Editor's Note** When AI moves from answers to actions

EXECUTIVE Q&A

14–20

### How CFOs Get More From ERP

**Scott Grillo**
WilliamsMarston



22–29

### How Far Should AI Go in Finance?

**Vijay Vidiyala**
PairSoft



MARKET REPORTS & NEWS

06 **Gartner Names Five Leaders in Service-Centric Cloud ERP**

07 **Gartner Names Seven Leaders in Product-Centric Cloud ERP**

08 **Infor and Anthropic Bring Claude to Manufacturing ERP**

10 **ECI Acquires uniPoint to Expand Quality Management in ERP**

11 **Dutch Defense Ministry Selects SAP Sovereign Cloud**

12 **France's ANSSI Sets Out Seven Principles for Securing AI Agents**

13 **Walmart Expands Symbotic Automation at 25 U.S. Sites**

# CONTENTS

## NEWS, PRODUCT UPDATES & CUSTOMER STORIES


31 NetSuite Expands Bank Imports and Leave Approvals

32 Truvant Selects QAD and Redzone for Seven Campuses

33 TAKKT's Delivery Capacity Near 10% During Cyber Recovery

34 Databricks Genie Brings SAP ERP Data Into ChatGPT

35 Julian Soler Uses AI to Rank Grape Recipes in Abas ERP

36 Kindo's Deep Hat Sift Filters Alerts Before AI Agents Act

37 SAP Outlines Seven Families of AI Agents for ERP Migration

38 Katana Adds AI Replenishment and Warehouse Connections

39 IBM and Microsoft Introduce Imagine Enterprise AI Agents

40 SAP Fixes Four Vulnerabilities Rated 10.0

41 Syspro Adds Traceability and Tighter Order Controls

42 Sage Intacct R4 Opens Its Finance Intelligence Agent

43 Bombardier Cuts Hours From Aircraft Range Calculations

44 WM Synergy Launches an Industrial AI Unit

45 Manufacturers Want AI Agents That Work Across Applications

46 Toyota Finance Australia Moves to SAP Public Cloud ERP

47 ShipStation Expands Its Acumatica Shipping Integration

48 Campfire Ember Creates Saved Reports From Chat

49 Rootstock Appoints Frederick Li and Promotes Ohad Idan

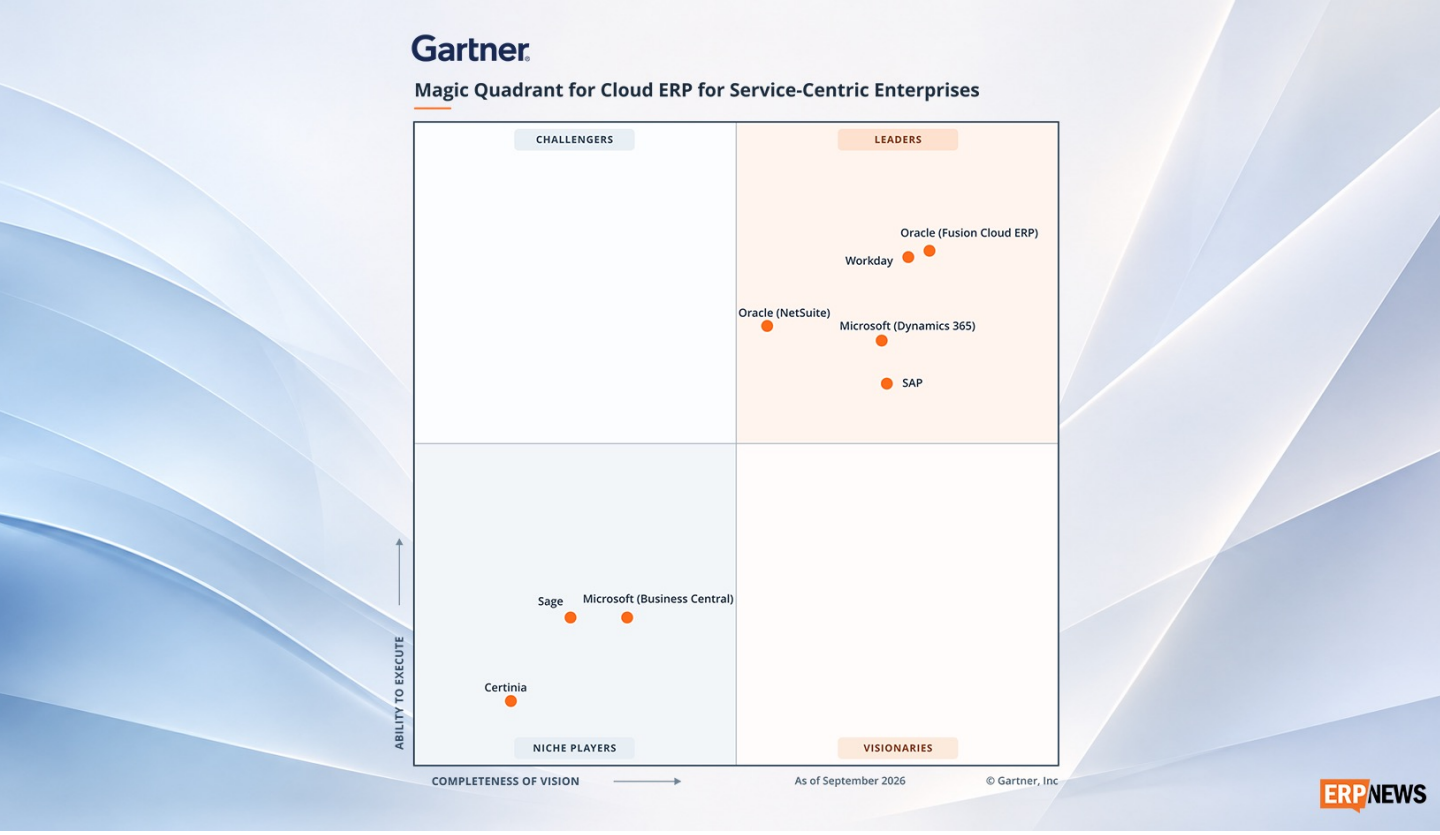
50 Esker Names Matthias Goehler Chief Product Officer

51 Google Previews S&P Global Data in Gemini Enterprise

52 SAP Migration Assistants Enter Early Customer Projects

53 Brennan Builds NetSuite Tools With Claude Code and Codex

54 Snowflake Expands Agent Work and Tightens Spending Controls




MARKET REPORT

READ FULL STORY

# GARTNER NAMES FIVE LEADERS IN SERVICE-CENTRIC CLOUD ERP

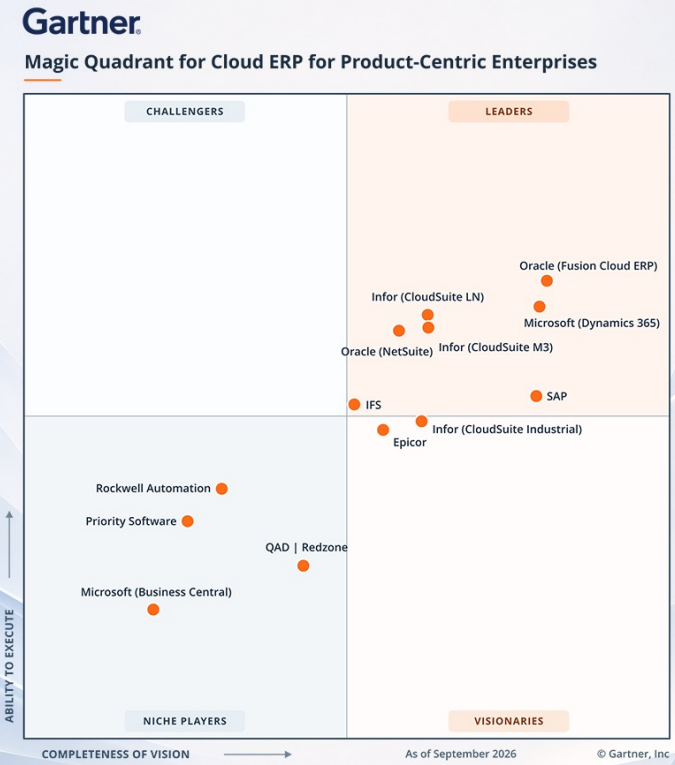
*The 2026 Magic Quadrant examines how cloud ERP supports financial operations, workforce planning and project delivery in service businesses.*

Gartner assessed eight offerings in its 2026 Magic Quadrant for Cloud ERP for Service-Centric Enterprises. Oracle Fusion Cloud ERP was placed highest for Ability to Execute and farthest right for Completeness of Vision. Workday Cloud ERP, Oracle NetSuite, Microsoft Dynamics 365 and SAP Cloud ERP rounded out the Leaders quadrant.

Certinia, Microsoft Dynamics 365 Business Central and Sage Intacct were placed in Niche Players. The Challengers and Visionaries quadrants were empty, and the lineup was unchanged from the previous year. Infor and Kingdee received honourable mentions. Gartner noted Infor's presence in US healthcare and the public sector.

The evaluation covers core finance, project accounting, procurement and HR, alongside requirements such as recurring billing and professional services automation. Gartner also considers integrated partner products where they meet its criteria. That matters when capabilities such as local payroll or specialist billing sit outside the core ERP.

For a project-based firm, one way to compare offerings is to follow a signed statement of work through staffing, time entry, a scope change and invoicing. The handoffs show where another application or integration comes into play. A subscription business can run a similar test by following a contract amendment through recurring billing and collections.




MARKET REPORT

READ FULL STORY

# GARTNER NAMES SEVEN LEADERS IN PRODUCT-CENTRIC CLOUD ERP

*The 2026 Magic Quadrant examines how cloud ERP supports planning, production and fulfilment for companies that make and distribute physical goods.*

Gartner assessed 13 offerings in its 2026 Magic Quadrant for Cloud ERP for Product-Centric Enterprises. Oracle Fusion Cloud ERP led on both axes. Oracle NetSuite, Infor CloudSuite LN, Infor CloudSuite M3, Microsoft Dynamics 365 Finance and Supply Chain Management, SAP Cloud ERP and IFS Cloud also placed in Leaders.

Epicor Kinetic and Infor CloudSuite Industrial were placed in Visionaries. Microsoft Dynamics 365 Business Central and QAD | Redzone entered the evaluation as Niche Players, alongside Priority ERP and Rockwell Automation Plex. The Challengers quadrant was empty. Gartner dropped SAP Business ByDesign because SAP is no longer actively marketing it.

Gartner evaluates separate ERP code lines individually. That distinction matters at Infor, where CloudSuite LN serves complex discrete manufacturing and CloudSuite M3 supports process manufacturing and distribution. IFS Cloud combines mixed-mode and engineer-to-order manufacturing with asset management and field service, a useful combination for companies that also maintain the equipment they build.

A practical comparison can start with a material shortage or a failed quality check. Following the resulting production change through stock availability, customer commitments and the general ledger shows where the proposed ERP can handle the exception and where another system is needed.




PRODUCT UPDATES

READ FULL STORY

# INFOR AND ANTHROPIC
## BRING CLAUDE TO MANUFACTURING ERP

*Manufacturing teams can use Claude to investigate production delays, check delivery options and approve changes to Infor M3 orders in the same conversation.*

Infor and Anthropic announced the integration on 12 November. Infor Industry AI for Claude connects the assistant to live M3 records and is available to selected Infor Velocity Suite customers. The initial workflows cover production planning, purchasing and customer service.

A planner can ask what is putting a manufacturing order at risk. Claude can check whether materials are short, a machine is at capacity or too few workers are available. If the schedule is no longer feasible, it can propose a new date and show which customer orders would be affected.

In one Infor example, a supplier expects to deliver 20 days late. Claude traces the shortage through production orders to the customer deliveries at risk. The buyer can review alternatives, including expediting the quantity needed immediately and keeping the original order open for the balance.

If a customer asks for an earlier delivery, a service representative can check stock across warehouses, see what is already allocated and review whether production could cover the shortfall. Claude can show which other orders would be affected before the representative approves a stock transfer.

## WHO CAN APPROVE AN ERP CHANGE?

**Claude can propose a change to a production or purchase order. A user reviews the proposal in Claude, and Infor M3 applies that person's existing permissions when the transaction runs.**

The integration has two parts. A connector built on the Model Context Protocol (MCP) makes selected M3 transactions available to Claude through Infor ION API Gateway. A separate plug-in provides instructions and dashboards for each role. A buyer can use a dashboard that ranks purchasing issues by the orders they affect.

Administrators decide which transactions the connector can initiate and which data fields it can return. They can configure it for read-only use by leaving out the tools that change records. In that setup, a planner can investigate a shortage and identify the orders at risk before deciding what to do in M3.

When changes are enabled, Infor says its plug-in is designed to request explicit approval for each proposed change. M3 then checks the signed-in user's authority for the transaction. A planner who can view a manufacturing order, for example, also needs permission to reschedule it.

That distinction matters when a recommendation affects more than one order. Before approving a stock reallocation, a customer service representative can review which warehouse would supply the units and which customer orders already have a claim on them. Those details help the representative decide whether the earlier delivery is feasible.

Infor records actions taken through the connector. The conversation gives users a place to investigate the issue and review the proposed change. M3 remains where the transaction runs, under the same user identity and authorisation rules that apply when staff work directly in the ERP.

## WHAT IT TAKES TO GO LIVE

**The integration is available to selected Infor Velocity Suite customers. The M3 setup requires an eligible Claude plan, administrator activation and an M3 account for each user.**

An Infor administrator registers Claude in ION API Gateway and grants the connector access to M3. On Claude Team and Enterprise plans, an authorised administrator also enables it for the organisation. Staff then sign in with their own Infor credentials.

Infor's setup guide describes separate connections for production, test and training environments. A buyer can use a test environment to check that a proposed purchase order change carries the expected quantity and delivery date before using the workflow on live orders.

Each additional environment has its own gateway settings. To connect a test or training environment alongside production, the administrator registers a separate application in Infor and uses that environment's connector address when configuring Claude.

Manufacturers can continue to use Infor's role-based workspaces and GenAI Assistant. Under the agreement, Claude becomes Infor's preferred assistant for interacting with its applications, and Claude models become its preferred models for Infor Industry AI.

Jessica Vincent, vice president of business solutions at Oldcastle APG, said the connection could make Infor data easier for staff to find while meeting the company's governance requirements. The announcement gave no figures on time saved or order processing.

Infor scheduled a 3 December demonstration of the initial workflows and plans to add more roles, skills and applications. A date for wider availability remains open.




MARKET & ECOSYSTEM

READ FULL STORY

# ECI ACQUIRES UNIPOINT
## TO EXPAND QUALITY MANAGEMENT IN ERP

*The acquisition brings inspection, defect tracking and corrective action tools already used with M1, JobBOSS and JobBOSS² into ECI's manufacturing portfolio.*

ECI Software Solutions announced on November 10 that it had acquired uniPoint Software, a Winnipeg-based quality management software provider. ECI says more than 1,200 manufacturers use uniPoint, including companies in aerospace and defence, medical devices and automotive.

The two companies already worked together. In April 2024, ECI launched JobBOSS² Advanced Quality using uniPoint's software to connect quality records with job data. The package launched with 23 modules and included an audit trail, tools for marking up dimensional inspection drawings and features for tracking the cost of quality work.

When a part fails inspection, a manufacturer can link the defect to the job that produced it, assign responsibility for resolving it and record the cost. If the same fault appears on another job, production and quality teams can compare the two cases and investigate a recurring problem.

ECI says existing uniPoint customers will retain their contacts and gain access to dedicated account support. uniPoint also says its software integrates with more than 50 ERP systems. The acquisition announcement did not specify future pricing, product packaging or plans for integrations with other ERP vendors.




CLOUD & DEFENCE INDUSTRY

READ FULL STORY

# DUTCH DEFENSE MINISTRY
## SELECTS SAP SOVEREIGN CLOUD

*The Netherlands-based cloud is scheduled to go live on 1 January 2028. The ministry will retain control over its data and how the environment is configured.*

The Dutch Ministry of Defence announced on 22 October that it had signed an agreement with SAP to develop and operate a sovereign cloud in the Netherlands. The environment will be built to meet the ministry's security requirements as it modernises critical digital systems.

SAP will handle maintenance, updates and much of the technical management. The ministry will decide how its data is processed and retain the ability to move it to another cloud environment. That gives the ministry flexibility to change where its systems run as operational needs evolve.

The SAP environment will form part of a wider multicloud strategy. The ministry will select environments based on each application's security and operational needs, using private clouds and dedicated infrastructure for highly classified information. It aims to reduce reliance on any single provider and improve recovery from disruptions.

The agreement follows an earlier milestone in the ministry's SAP programme. SAP Defense & Security went live in January 2026 under Program Roger. That deployment supports mission planning and gives teams better visibility into equipment and supplies.




ENTERPRISE AI

READ FULL STORY

# FRANCE'S ANSSI SETS OUT SEVEN PRINCIPLES FOR SECURING ENTERPRISE AI AGENTS

*The guidance asks organisations to decide which actions AI agents can take on their own, which require human approval and which must be blocked.*

France's national cybersecurity agency, ANSSI, published *Securing an Agentic AI System* on 30 October. The guide is aimed at organisations that deploy or integrate agents, including those using commercial products whose settings and connectors they control.

ANSSI recommends assessing risks during design and revisiting them when the system changes. Teams should define each agent's task, expand its autonomy gradually and classify actions by the level of approval they require. The guide also calls for separate identities, connectors and memory across development, testing and production.

Permissions should be enforced outside the model, with actions blocked by default. ANSSI also recommends protecting credentials, limiting interactions between agents and providing a way to stop and recover the system. Teams should test those controls, monitor activity, keep a record of system components and protect activity logs.

For ERP teams, the sequence of actions matters. Creating a supplier record, updating payment details and preparing a payment may each be permitted on their own. Together, they could bypass separation of duties. When approval is required, the reviewer should see the exact action, its purpose and its expected effects.




CUSTOMER STORIES

READ FULL STORY

# WALMART TO EXPAND SYMBOTIC AUTOMATION ACROSS 25 U.S. DISTRIBUTION CENTRES

*The retailer has made an initial spending commitment of about $6 billion over several years to increase storage capacity and improve inventory flow.*

Walmart and Symbotic announced an expanded agreement on 29 October, building on more than a decade of work together. Walmart plans to add automation at 25 U.S. regional distribution centres, with the aim of moving goods more efficiently and making replenishment more reliable.

The expansion also targets how Walmart manages inventory before it reaches e-commerce fulfilment sites. Greater storage capacity and better stock availability earlier in the network could help Walmart offer a wider assortment and serve customers faster across stores, curbside pickup and home delivery.

Symbotic combines warehouse robotics with AI-enabled software that coordinates the movement of goods. Its portfolio includes BreakPack for picking individual items and SymMicro for e-commerce fulfilment. The companies have yet to specify which facilities will receive those capabilities.

The agreement also opens the door to further projects in Walmart's global supply chain. The 25 facilities announced so far are all in the United States. The companies have yet to release a site-by-site schedule or quantify the capacity gains they expect from the expansion.

# HOW CFOs GET MORE FROM ERP

*Finance priorities after go-live and where AI fits*

Scott Grillo, Managing Director of NetSuite Services at WilliamsMarston, discusses what CFOs can do to keep an ERP implementation on track, how managed services can help finance teams improve NetSuite after go-live and where AI can make financial information easier to access

WM WILLIAMSMARSTON
Accounting | Tax | Technology | Transactions | Valuation

## THE CFO's ROLE DURING IMPLEMENTATION

A project can go live on schedule and still miss the goals that justified it. Grillo explains how sustained executive sponsorship and hands-on testing by the client help teams verify that the system supports the processes they set out to improve.

## PRIORITIES AFTER GO-LIVE

Once the system is running, finance teams can plan improvements around specific needs, from bringing fixed asset records into NetSuite to redesigning how an organisation reports across its entities.

Grillo explains how to choose what to tackle first and what a measure such as time to close can tell CFOs about the return on those changes.





# SCOTT GRILLO

## Managing Director, Netsuite Services

WILLIAMSMARSTON
Accounting | Tax | Technology | Transactions | Valuation

Scott Grillo leads WilliamsMarston's NetSuite practice and has more than 16 years of experience in ERP consulting and business systems. He previously led Charted's NetSuite consulting business and joined WilliamsMarston following its acquisition of the practice.

Before Charted, Grillo was a director in RSM's Business Applications practice. He spent more than 12 years at Oracle NetSuite in sales and professional services roles. He holds a bachelor's degree from Skidmore College.

ERP NEWS

*"An organization can have a technically successful implementation, hit its go-live date, and still fall short of the original vision."*

**Q: WilliamsMarston's recent acquisition of Charted's NetSuite Services practice brings ERP implementation and ongoing support together with the firm's established expertise in financial reporting, FP&A, and CFO advisory. What opportunities does this combination create for clients, and how does it change the way you approach ERP transformation compared with a traditional implementation-focused engagement?**

**SCOTT GRILLO:** The biggest opportunity is that we can support our clients more holistically. My team implements NetSuite and helps clients optimize it over time, ensuring they get the most from their investment. WilliamsMarston brings a much broader range of expertise across the Office of the CFO. Together, we can guide clients from assessing financial and operational needs through implementing supporting technology.

Traditional implementations require clients to provide certain resources and expertise, such as extracting and preparing legacy-system data, defining business requirements, and ensuring compliance with GAAP, ASC 606, and other accounting standards. Now, we can combine that expertise with our NetSuite team to provide clients with a more comprehensive, end-to-end offering needed to get the implementation right.

**Q: ERP implementations are often evaluated against familiar milestones such as budget, timeline, and go-live readiness. Yet many organizations struggle to realize the full business value they originally expected. Based on your experience, where do NetSuite implementations most commonly fall short, and what distinguishes a technically successful deployment from a transformation that genuinely improves financial operations?**

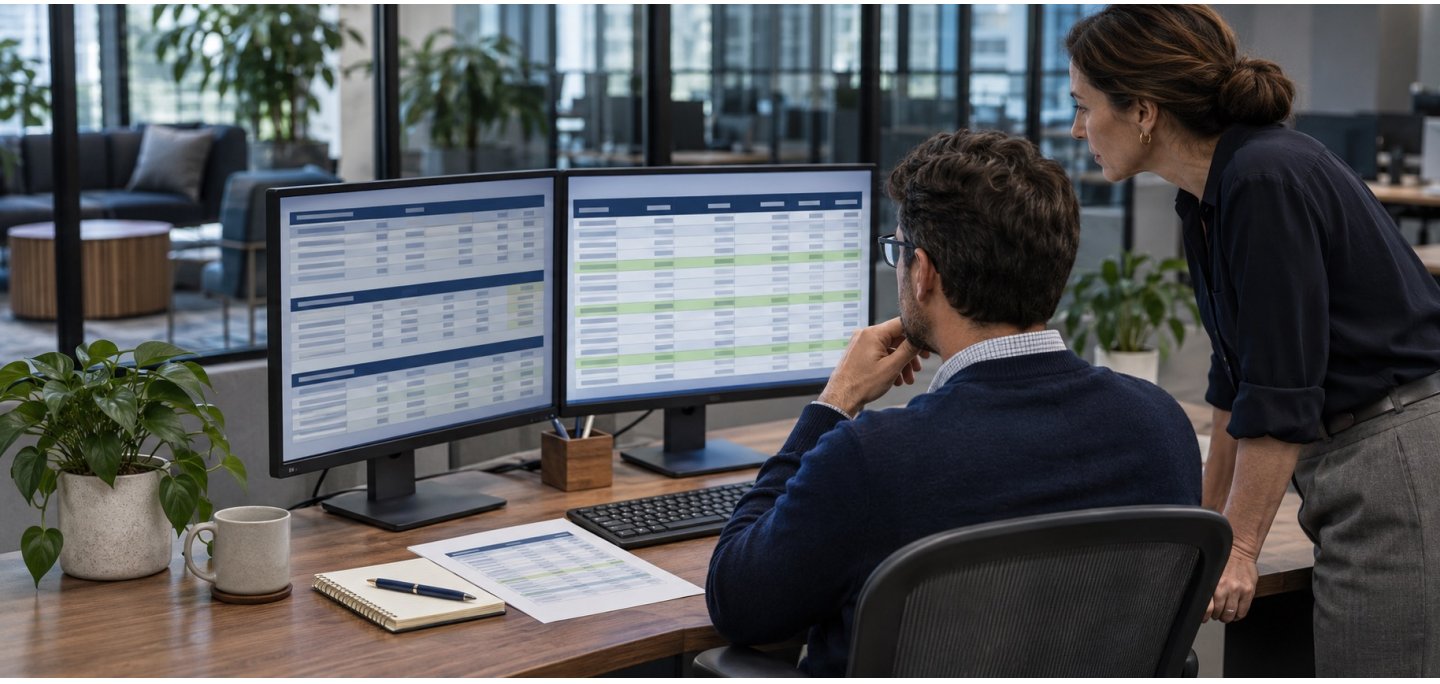
**SCOTT GRILLO:** ERP implementations often fall short when executive sponsorship fades. A CFO may choose NetSuite and delegate the implementation to their team, but their vision can get lost in translation or fade without ongoing leadership involvement.

An organization can have a technically successful implementation, hit its go-live date, and still fall short of the original vision. That becomes especially clear during testing. The implementation team can gather the business requirements and configure the system, but the client needs to be actively involved in testing to make sure it works as intended. If the client isn't engaged in that process, important issues can be missed, and they may end up with a system that doesn't deliver what they expected.

**Q: Growing and middle-market companies frequently adopt NetSuite to replace fragmented financial systems and support increasingly complex operations. However, rapid growth can introduce new challenges involving multi-entity structures, reporting requirements, integrations, and process standardization. Which of these challenges tend to be underestimated during implementation, and how should organizations address them before they become long-term operational problems?**

**SCOTT GRILLO:** Three areas are consistently underestimated: data migration, integrations, and change management.

Data migration can be a project in itself, especially when information is spread across multiple legacy systems and spreadsheets. Getting that data into a standardized format takes time and planning. Integrations can be equally complex. Even something as straightforward as connecting an e-commerce website to an ERP requires careful planning to ensure information flows correctly between systems. Both need to be scoped realistically from the beginning.



Change management is just as important, particularly for growing businesses. Employees may have spent years using QuickBooks, other legacy ERPs, or a mix of systems and manual processes. Moving to an entirely new system means changing how people work, and businesses need to account for that. Training, communication, and helping employees feel comfortable with the transition are critical to a successful implementation.

Q: **The role of ERP implementation partners is evolving as organizations expect more than system configuration and deployment. With managed services becoming an increasingly important part of the relationship, how should companies approach continuous optimization after go-live? What should they expect from a long-term NetSuite partner as their business processes, reporting requirements, and technology environments change?**

**SCOTT GRILLO:** It's very uncommon for an ERP implementation to deliver everything on a company's wish list from day one. The initial priority is getting the new system up and running so the business can start realizing its value. From there, managed services should focus on a roadmap for continued improvements over the next three, six, 12, or 18 months.

Those improvements might be as straightforward as moving a fixed asset list from a spreadsheet into NetSuite or as involved as updating the company's reporting strategy and system structure. A good managed services partner helps clients identify and prioritize those opportunities based on their business needs, determine how NetSuite can support them, and execute against that roadmap. As the business evolves, the system should evolve with it.

> "As the business evolves,
> the system should evolve with it."
> — Scott Grillo

**Q:One of the opportunities created by bringing NetSuite services into WilliamsMarston is the closer connection between ERP technology and the Office of the CFO. How can combining implementation expertise with FP&A, financial reporting, and strategic finance advisory help organizations move beyond transactional efficiency toward better financial visibility, forecasting, and decision-making?**

**SCOTT GRILLO:** WilliamsMarston's advisory teams work closely with clients every day, so they understand their businesses, financial needs, and priorities. That gives our NetSuite team valuable insight into what matters most to each client and how the technology can best support those goals.

That understanding directly informs how we configure and optimize NetSuite, approach reporting, and prioritize future improvements. There's also a practical advantage to having that expertise within one organization. It's easier to collaborate, share information, and work through challenges when the financial and technical teams are working together.

Ultimately, that closer collaboration allows us to move faster, make better-informed recommendations, and deliver better outcomes for clients.



**Q: Accounts payable automation remains an important area of finance transformation, particularly as organizations look to reduce manual processing, improve controls, and accelerate the financial close. With Charted continuing as an independent AP automation provider and strategic partner, how do you see the relationship between ERP-native automation and broader finance transformation evolving? What should companies consider when deciding which processes to automate within their ERP environment?**

**SCOTT GRILLO:** Companies generally take one of two approaches to business technology: a best-of-breed strategy or a platform strategy.

With best-of-breed, organizations select specialized systems for each function, such as NetSuite for ERP, Salesforce for CRM, and a separate tool for AP automation. These systems can offer more advanced features, but integrating and maintaining multiple applications adds complexity.

A platform strategy prioritizes doing more within fewer systems, even if that means giving up some specialized functionality. Charted supports this approach by offering AP automation built directly within NetSuite. Clients can manage vendors, process payments, and access more advanced AP capabilities without leaving their ERP environment. We'll continue working with Charted as a strategic partner when those capabilities align with our clients' needs.

Neither approach is inherently better. The decision comes down to what the business needs, how important specialized features are to its operations, and how many systems it wants to manage.



**Q: Artificial intelligence is becoming a growing priority for finance leaders, but many organizations still face challenges with inconsistent data, fragmented processes, and limited visibility across their systems. Where do you see the most practical opportunities for AI within NetSuite-driven finance operations today, and what foundations should companies establish before investing in more advanced AI-enabled capabilities?**

**SCOTT GRILLO:** One of the most practical opportunities for AI today is making it easier to access information and insights from NetSuite. Through MCP (Model Context Protocol), businesses can connect AI tools such as Claude or ChatGPT to their ERP environment and start asking questions about their operations.

For example, a finance team might want to understand its sales pipeline, identify its largest customers, or flag accounts that may be at risk. AI can help retrieve that information without having to manually build reports for every question.

My advice is to start with the business questions you're already trying to answer and see how AI can help. We're taking a similar approach internally, using AI to automate manual tasks in our consulting work, such as turning meeting notes into requirements documents. These are practical opportunities to reduce repetitive work, improve efficiency, and get information faster.

**Q: How connected operations and real-time data are changing enterprise management? For manufacturing, infrastructure, and other asset-intensive businesses, how can ERP systems such as NetSuite help connect operational information with financial performance? What challenges arise when organizations try to turn data from equipment, inventory, and operational systems into meaningful financial insights?**

**SCOTT GRILLO:** For asset-intensive businesses, it's important to bring operational and financial information together within the ERP. Companies need to understand an asset's financial performance, including its value and depreciation schedule, alongside operational details such as maintenance requirements and warranty status.

NetSuite's fixed asset management capabilities, along with integrated third-party solutions, can help businesses manage that information in one place. When assets are tracked offline or in separate systems, someone still needs to bring the financial information into the ERP to record depreciation and account for those assets on the balance sheet. That creates additional manual work and opportunities for errors. Keeping that information connected makes it easier to manage assets, maintain accurate financial records, and understand their operational and financial performance.

**Q: As organizations explore predictive maintenance, connected assets, and automation, how should they evaluate the return on these investments from an ERP and CFO advisory perspective? Which financial and operational metrics best show whether greater connectivity is delivering business value?**

**SCOTT GRILLO:** Calculating a precise ROI for an ERP investment can be challenging. Most CFOs have a business case and understand why they need the technology, but there isn't always one specific number they can point to as their return.

There are usually several factors driving the investment, including business growth, the number of entities being managed, the number of systems in use, and the efficiency of financial processes. Some improvements are easier to measure than others. For example, if a company's month-end close currently takes 15 days and the goal is to reduce that to five, that's a tangible outcome to track.

The same principle applies to connected assets and other technology investments. Businesses should start by identifying what they're trying to improve, whether that's reducing manual reconciliation, gaining better visibility into assets, or managing operations more efficiently. Those improvements can demonstrate meaningful value, even when they don't translate neatly into a single ROI figure.



**Q: Looking ahead three to five years, how do you expect the relationship between ERP technology, managed services, and financial advisory to evolve? As organizations face growing pressure to modernize their systems, adopt AI, and improve financial performance, what should CFOs and technology leaders prioritize today to ensure their ERP investments continue delivering value well beyond implementation?**

**SCOTT GRILLO:** In the next three to five years, the pace of advisory and technology adoption will accelerate. Leveraging AI will help accelerate ERP implementations, both new implementations and improvements within existing ERP environments.

To maximize their ERP investments, CFOs and technology leaders should prioritize regular system health checks. As a business evolves, its ERP system needs to evolve with it, and managed services help ensure that happens.



ERP NEWS

## EDITORIAL TAKEAWAY

An ERP system can go live on schedule and still leave finance teams with a slow close or hours of manual reconciliation. Scott Grillo's point is that CFOs need to stay involved through testing and keep setting priorities once the system is running.

Regular system health checks give finance and technology teams a chance to review those priorities together. Managed services can help them tackle improvements in stages, from moving a fixed asset register out of a spreadsheet to redesigning reporting across multiple entities.

The gains are easier to judge when teams agree on a baseline. If the month-end close takes 15 days and the goal is five, finance can track progress each month. For connected assets, teams might measure how much manual reconciliation remains once maintenance and accounting records are brought together.

AI can help finance teams answer questions they already ask, such as which customer accounts may be at risk. Giving teams faster access to ERP data lets them spend more time checking what the answer means for the business and deciding how to respond.

**BEFORE THE NEXT ERP INVESTMENT, AGREE ON WHAT FINANCE NEEDS TO IMPROVE AND HOW YOU'LL MEASURE IT.**

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ERP News Executive Q&As give technology leaders space to explain what matters, what they have learned and where the industry goes next.

**01**
**YOUR STRATEGY**
The decisions driving change.

**02**
**YOUR LESSONS**
The experience worth sharing.

**03**
**YOUR OUTLOOK**
The future you are helping build.

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# HOW FAR SHOULD AI GO IN FINANCE?

*Where automation helps and who approves payments*

Vijay Vidiyala, Chief Product & Technology Officer at PairSoft, discusses how AI agents can use live ERP data to investigate invoice exceptions and prepare payments. He explains how finance teams can measure progress, from the cost of processing an invoice to the share of early-payment discounts they capture.

PairSoft

## WHO APPROVES THE PAYMENT?

An agent can assemble a payment run using due dates, discount terms and cash targets. Vidiyala explains why a person should still release the funds and approve changes to supplier bank details. For auditors, the record should show what the agent checked, why it made a recommendation and who approved the outcome.

## FROM MAINTENANCE TO PROCUREMENT

A warning that equipment will soon need servicing can give buyers time to order parts or book a technician. Vidiyala describes how that warning could trigger a requisition with the asset, preferred supplier, contract price and approver already identified.

Linking the work order, purchase order, receipt and invoice in the ERP gives finance a clearer view of what each asset costs and how much goes to unplanned maintenance or emergency purchases.





# VIJAY VIDIYALA

## Chief Product & Technology Officier

PairSoft

Vijay Vidiyala leads product and engineering at PairSoft, where he oversees the development of software for accounts payable, procurement and related finance workflows. He brings more than two decades of enterprise software experience, including senior roles at Model N and SAP.

At Model N, Vidiyala led product, engineering and operations teams across the United States, Europe and India and helped shape the company's transition to software as a service. He previously spent about a decade at SAP, leading product development and go-to-market work for cloud solutions.

ERPNEWS

*"The near-term goal isn't lights-out AP. It's an AP team where agents handle the volume and people handle judgment, with every action logged and explainable."*

**Q: You've joined PairSoft as Chief Product & Technology Officer at a time when artificial intelligence is reshaping expectations for enterprise finance software. What attracted you to PairSoft at this particular stage of its development, and where do you see the greatest opportunities to evolve its product and technology strategy over the next few years?**

VIJAY VIDIYALA: What drew me to PairSoft is something I rarely see: a genuine understanding of how finance teams work day-to-day, inside the ERP systems they already run. Many vendors start with a technology and look for a problem. PairSoft started with the invoice, the approval and the payment, and built out from there.

That matters now, because AI is changing what is possible for the Office of the CFO, but only when it is grounded in real workflows and real data. The biggest opportunity over the next few years is to make AI practically useful in daily finance work rather than impressive in a demo: agents that resolve exceptions, code invoices from a company's own history and flag risk before a payment goes out, all running natively in the ERP. Part of my job is to bring invoice automation, procurement, payments and document management together into one coherent workflow. The other part is building product and engineering teams that keep customers at the center of every decision.

**Q: Your career spans more than two decades in enterprise software, including leadership roles at SAP and Model N, where you helped navigate the transition toward SaaS-based solutions. How have those experiences shaped your approach to product innovation, and what lessons from previous technology shifts do you believe are particularly relevant as enterprise software enters the AI era?**

**VIJAY VIDIYALA:** I've been through two platform shifts from the inside. In my previous roles, I was part of the product development and go-to-market teams that brought first-generation cloud and SaaS solutions to finance and revenue management functions in highly regulated industries, and helped move customers from on-premise to SaaS. Working on both product and go-to-market, I saw the full cycle up close: how enterprise software gets built, how it gets sold and how customers adopt it.

Those shifts shaped how I approach product innovation. Technology only matters if customers can adopt it and get value from it. Moving to SaaS was never mainly an engineering problem. Customers had to trust that their data, controls and processes would hold up in the new model.

We earned that trust through change management: working with each customer on how their team would operate differently, not only on what the software did. Now I start every product decision with two questions: how will customers adopt this, and how will they measure the value?

The AI transition is the same test with higher stakes. In finance, the first question is no longer only where the data lives. It's who made a decision and whether that decision can be explained. Every AI-driven step in a business process has to be accountable and auditable, with a clear record of what the agent did, why it did it and which person approved it.

One more lesson carries over. Early in the SaaS shift, some vendors hosted their old product and called it cloud. The winners rebuilt how the software worked. With AI, adding a chatbot to an old workflow is the equivalent mistake. At PairSoft, we're redesigning the AP workflow around that lesson, with agents doing the repetitive checks, people owning the approvals, and customers seeing value early.



Q: **PairSoft emphasizes an ERP-embedded approach to accounts payable and procurement automation, rather than relying on standalone applications operating alongside core financial systems. What are the practical advantages of this architecture for finance teams, and where do you see the most significant differences in integration complexity, data consistency, user experience, and long-term scalability?**

**VIJAY VIDIYALA:** Finance teams get the depth of a best-of-breed procure-to-pay solution without losing the ERP as their system of record. PairSoft comes with native integrations to the ERPs our customers run, so there's no custom integration to build. Our AP and procurement processes are streamlined around how people actually work, which gives finance teams faster time to value, higher productivity and less reconciliation work.

**Integration complexity.** Standalone applications often need connectors, middleware or custom development before they work, and that work has to be maintained through every ERP upgrade. With PairSoft, the integration is already in the product. Customers configure it; they don't build it.

**Data consistency.** Invoices are matched against the ERP's own vendor master, purchase orders, receipts and GL structure. Data consistency and synchronization is part of the design. The audit trail ties back to the ERP transaction.

**User experience.** ERPs are built to record transactions. Requisitions, approvals, invoice exceptions and vendor inquiries need workflows designed for the people doing that work, and that's where a specialized procure-to-pay solution adds value. PairSoft streamlines those steps and shows its data at the ERP transaction level, so a user looking at a vendor bill can see the invoice, approval history and status without switching systems. Fewer screens and fewer lookups mean AP teams and approvers get more done.

**Long-term scalability.** New entities, new countries and newly acquired ERPs can be added without rebuilding the process. A company running more than one ERP can run one AP process across all of them. This matters for AI too. Agents that work from live ERP data, follow ERP permissions and keep a person in the loop for payments are agents a CFO can trust.

**Q: PairSoft supports a broad range of ERP environments, including Oracle, Microsoft Dynamics, Business Central, 365 F&O, NetSuite, Sage Intacct, Blackbaud, Plex, and Infor SyteLine. Each platform has its own architecture, workflows, and customer requirements. How do you approach building a consistent product experience across such a diverse ecosystem while preserving the depth of integration and industry-specific functionality that customers expect?**

**VIJAY VIDIYALA:** For us, consistency means the intelligence and controls behave the same on every ERP, while the screens, transactions and workflows follow each customer's ERP and industry. We build the product in three layers.

The first layer is a shared core: document capture, AI models for coding and matching, workflow logic and anomaly detection. We build and maintain these once, centrally. Customers get the same quality on whichever ERP they run, and every platform benefits from each improvement.

The second layer is where the ERP meets the user, and here we go native. Each platform has its own data model, transaction types and conventions, and customers chose their ERP for good reasons. A lowest-common-denominator experience across all of them would throw away the depth they paid for.

The third layer is industry. A nonprofit on Blackbaud cares about fund accounting and grant restrictions. A manufacturer on Plex or SyteLine cares about direct materials, receiving and line-level PO matching. Those requirements shape the workflows we build for each industry.

**Q: Despite years of investment in financial automation, many organizations still struggle with manual invoice processing, fragmented approval workflows, limited visibility into spending, and exceptions that require significant human intervention. From your perspective, why have these challenges proved so persistent, and what separates organizations that achieve meaningful process transformation from those that simply digitize existing inefficiencies?**

VIJAY VIDIYALA: Three things keep these problems alive. First, the costs are fragmented. Labor sits in one cost center, late fees in another, and missed early-payment discounts never show up at all, so no single report shows the full picture. Second, AP is often treated as a cost of doing business, so investment goes to revenue-facing systems instead. Third, many earlier projects simply digitized paper. OCR and scripted bots moved documents faster but left the exception workflow untouched, so the hard cases still landed on people's desks.

Organizations that truly transform start by measuring cost per invoice, discount capture and first-pass match rate. They map where exceptions come from and fix policy before technology, such as enforcing "no PO, no pay" and setting clear approval thresholds. Only then do they automate. Automation amplifies whatever process it's given, good or bad.

> "Automation amplifies whatever process it's given, good or bad."
> — Vijay Vidiyala

**Q: AI is moving beyond document recognition and workflow assistance toward agents capable of interpreting information, coordinating activities, and potentially executing financial processes. Where do you see the most immediate and realistic opportunities for agentic AI in accounts payable and procurement, and where do you believe expectations are currently running ahead of what the technology can reliably deliver?**

VIJAY VIDIYALA: The most realistic opportunities right now are in work that's high-volume, rule-bound and easy to check. Four stand out.

Exception handling. An agent can tell why an invoice failed to match, pull the PO, receipt and vendor history, and propose a resolution for a person to approve. That shifts AP staff from investigating each exception to deciding how to resolve it.

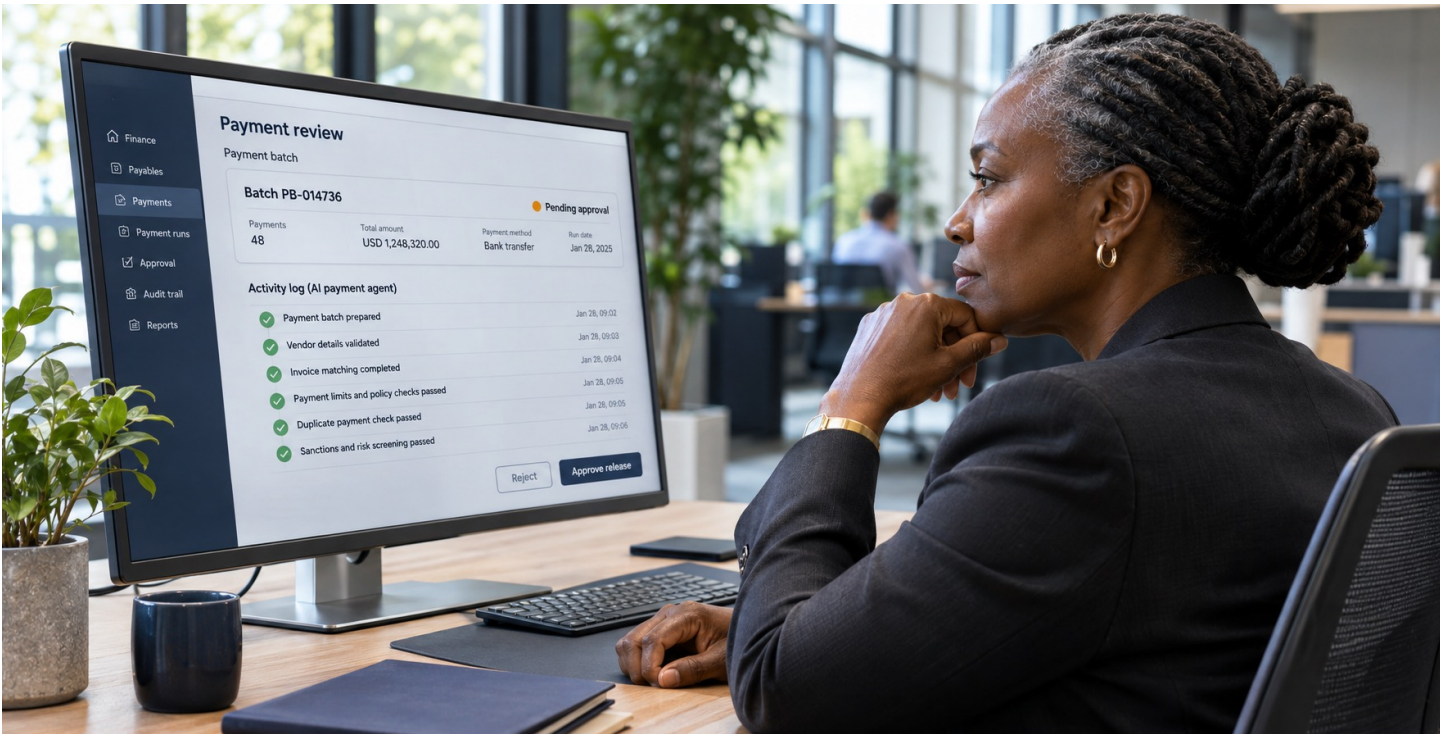
Vendor inquiries. "Where's my payment?" makes up a large share of AP inbox traffic. An agent can read the email, check status in the ERP and draft the reply.

Coding and anomaly checks. Agents can suggest GL coding based on past invoices and flag duplicates, unusual amounts or changed bank details before a payment is made. Payment preparation. An agent can assemble the payment run against due dates, discount terms and cash targets, and run fraud checks before anyone sees it. A person reviews it and releases the funds.

Each of these has a clear right answer, a full audit trail and a person approving the outcome. That combination is what makes them deployable today.

Expectations run ahead of the technology in two places. The first is fully autonomous payment execution. Agents can prepare payments, but releasing funds without human approval creates fraud and control risks that no CFO or auditor should accept yet. The second is the assumption that agents can work around bad data. An agent reading an outdated vendor master or an unclear approval policy will make the same mistakes faster. Most AP failures I see are failures of data and policy, not of models.

The near-term goal isn't lights-out AP. It's an AP team where agents handle the volume and people handle judgment, with every action logged and explainable.




**Q: As AI takes on greater responsibility within financial workflows, questions around accuracy, explainability, auditability, and human oversight become increasingly important. How should enterprise software providers balance intelligent automation with the financial controls organizations depend on? Which decisions could reasonably become more autonomous, and where should human approval remain essential?**

VIJAY VIDIYALA: The mistake some providers make is building AI outside their existing approval structures instead of inside them.

The first control is choosing the right technology for each task. Not everything should be generative AI. Robotic process automation is right for fixed, repeatable steps such as moving data between screens. Machine learning is right for pattern-based predictions such as GL coding and anomaly detection. Generative AI is right for reading unstructured documents, explaining a decision, and drafting a reply. Proprietary algorithms are right where the answer must be exact and repeatable, such as matching an invoice to a PO within tolerance. Using a probabilistic model where a deterministic rule is needed creates risk without adding value.

The second control is how the agent operates. Every action is logged with what it read, what it concluded, and why, so an auditor can replay the decision in plain language. Separation of duties still applies: the agent that prepares a payment run cannot release it. And when the agent isn't confident, by a threshold the finance team sets, it hands the case to a person with its reasoning attached.

With those controls in place, several decisions can run autonomously: extracting invoice data, suggesting GL codes, matching within tolerance, flagging duplicates, routing approvals and answering vendor status questions. Posting a fully matched invoice under a set threshold is a reasonable next step.

Human approval stays essential wherever money leaves the company or a control is changed: releasing payments, approving new vendors and bank detail changes, resolving exceptions outside tolerance, anything above an individual's authority limit, and changing the policies the agents operate under.

The line will move as the technology matures. It should move because the audit trail proves the agent is reliable, not because a vendor says so.

**Q: Our November issue explores the theme "Smarter Assets, Smarter ERP," focusing on how connected operations and real-time information are changing enterprise management. In manufacturing and other asset-intensive industries, IoT-enabled equipment monitoring and predictive maintenance can generate new operational requirements, from replacement parts to service procurement. How do you see ERP-embedded procurement and financial automation evolving to support these increasingly connected and data-driven operational environments?**

VIJAY VIDIYALA: Predictive maintenance changes the timing of procurement. Instead of buying a part after a machine fails, the business knows weeks in advance that it will need one. Procurement has to keep pace with that signal, or the value of the prediction is lost to an emergency purchase at a premium price.

I expect procurement to become more event-driven. A maintenance agent can raise a requisition that already knows the asset, the preferred supplier, the contract price and the right approver based on how critical that equipment is. Service procurement matters just as much: external technicians, inspections and repairs need to be ordered, received and invoiced against the work they relate to.

This is where an ERP-embedded approach helps. When the work order, purchase order, receipt and invoice share one record inside the ERP, finance can match what was planned, ordered, done and billed without reconciling separate systems. Connected assets generate more transactions, so automating the routine ones becomes essential rather than optional.

**Q: As manufacturers and industrial businesses connect more operational data to their ERP systems, finance teams have opportunities to gain greater visibility into maintenance spending, asset-related procurement, and the financial consequences of equipment performance. From the perspective of the Office of the CFO, how can intelligent procurement and AP automation help translate this information into better cost control, financial planning, and measurable business outcomes?**

VIJAY VIDIYALA: The key is linking spend to the asset that caused it. When every purchase order and invoice for parts and services is tied to a specific piece of equipment, finance can see cost per asset, planned versus unplanned maintenance spend and how much is going to urgent buys at premium prices. That turns maintenance from a single budget line into something the CFO can manage.

It also sharpens planning. Predictive data shows when spend is coming, so finance can forecast it, procurement can negotiate supply agreements in advance, and the business can avoid carrying excess spare-parts inventory just in case. Automated accruals for services received but not yet invoiced make the month-end position more accurate.

The measurable outcomes are concrete: fewer emergency purchases, lower inventory carrying costs, better supplier pricing, more early-payment discounts captured and more reliable forecasts. Underneath all of that is clean, connected data. Without it, operational signals stay in operations and never reach the decisions finance has to make.



**Q: Looking ahead three to five years, how do you expect the relationship between ERP platforms, specialized finance applications, and AI-driven automation to evolve? Will the next generation of finance technology be defined primarily by greater autonomy, deeper integration, or a fundamental change in how finance professionals work? And what should CFOs and technology leaders be prioritizing today to prepare for that future?**

**VIJAY VIDIYALA:** The ERP will remain the system of record. Specialized applications will handle integration and orchestration across business processes, connecting procurement, AP, treasury and operations. AI agents from both the ERP and the specialized applications will interact, hand work to each other and collaborate on execution. From the user's point of view, the boundaries will blur. Underneath, the architecture matters more than ever, because it determines whether those agents work from one set of data under one set of controls.

Of the three options in the question, the most significant change will be in how finance professionals work. Autonomy and integration are the means. The result is a function that spends less time processing transactions and more time supervising exceptions, analyzing spend, managing working capital and risk, and advising the business.

To prepare, CFOs and technology leaders should do five things now.

Clean up master data, especially the vendor master. Bad vendor data produces bad agent decisions, only faster. Rethink standard operating procedures, policies and workflows across agents and people before automating them. Automating today's process locks in today's problems.

Set baselines for cost per invoice, cycle time and discount capture, so improvement can be proven rather than claimed.

Put AI governance in place now: what agents can decide, what they hand to a person, who is accountable, and what the audit trail must show. Hold vendors to that standard when you evaluate them. Invest in the team's skills, so people are ready for the analytical and advisory work ahead.

## EDITORIAL TAKEAWAY

Vijay Vidiyala draws a practical line for finance leaders. An AI agent can investigate why an invoice failed to match, gather the supporting records and prepare a payment run. An authorized person releases the funds. The audit trail should show what the agent checked, what it recommended and who approved the decision.

The ERP record also connects financial decisions to what happens on the factory floor. When a maintenance alert triggers a requisition, linking the work order, purchase order, receipt and invoice to the same asset lets finance see what planned maintenance costs and how much it spends on emergency purchases.

That visibility depends on accurate supplier records and clear approval rules. Before automating a workflow, finance teams need to understand why exceptions occur and establish a baseline for cost per invoice, processing time and discounts captured. Those measures show whether the entire process improves once agents take on routine checks.

As agents handle more of those checks, finance professionals can spend more time resolving exceptions, analyzing spending and managing working capital. CFOs can use the results to decide which workflows are ready for more automation and where staff still need to intervene.

**GIVE AI MORE AUTHORITY ONLY WHEN THE AUDIT TRAIL SHOWS IT CAN HANDLE THE WORK RELIABLY.**

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PRODUCT UPDATES

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# NETSUITE'S NOVEMBER UPDATE

## BANK IMPORTS AND LEAVE APPROVALS

*The November update lets eligible bank connections process up to 100 statement files in one run and brings SuitePeople leave requests and approvals to the REST API.*

Oracle's November update for NetSuite 2026.2 lets eligible bank connections process several statement files in a single run. The limit is 100 files per format profile, with the newest processed first. The feature requires a custom profile whose connectivity plug-in supports multi-file imports.

NetSuite records the result for each statement file, so an error in one file can appear alongside successful imports in the same run. Finance teams can see which statements were processed and which need attention. Connections using older plug-ins continue through the existing import process.

In SuitePeople, the REST API now lets employees submit leave requests, check their status and update performance goals. Authorised managers can act on requests through the same interface. NetSuite applies its existing permissions, validation rules and approval workflows to those actions.

The change also makes these tasks available to AI assistants through the NetSuite AI Connector Service. Administrators can enable the connector for the Employee Center role by granting the required permissions. Once connected, employees and managers can access the records and actions their role already allows.




CUSTOMER STORIES

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# TRUVANT SELECTS QAD AND REDZONE FOR SEVEN CAMPUSES

*The contract packager and co-manufacturer plans to standardise planning and shop-floor operations across its sites in the United States and Poland.*

Truvant has selected QAD Adaptive ERP, Redzone Connected Workforce and ChampionAI for four U.S. campuses and three in Poland. The sites provide contract packaging and manufacturing services for brands in food and beverage, personal care and household products.

Truvant plans to use QAD Adaptive ERP to standardise planning, inventory, quality, purchasing and finance. A shared configuration will help sites apply the same processes and make their performance easier to compare.

Redzone gives production teams access to live line data during shifts and helps supervisors coach operators. Truvant started with Redzone at one site to learn what worked before expanding its use.

The programme will also help Truvant bring acquired operations into the network. New Jersey-based Multi-Pak Packaging adds bottling, blister packaging and cold-chain handling, so the shared processes need to accommodate different production requirements.

Truvant plans to bring campuses onto the platform in stages, with local teams involved in training in both regions. It intends to track scrap, reruns and other avoidable waste as the rollout progresses.

ChampionAI is intended to automate routine tasks and support decisions across supply chain, purchasing and production. The announcement leaves open which workflows will use it at each campus.



CUSTOMER STORIES

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# TAKKT DELIVERY AT AROUND 10%
## DURING ERP CYBERATTACK RECOVERY

*The distributor continued taking orders while it restored the systems that support order processing, deliveries and invoicing.*

TAKKT detected a cyberattack on 19 October and disclosed it two days later. It took some systems offline as a precaution, restricting order processing, customer service and deliveries. The disruption mainly affected Industrial & Packaging in Europe and Foodservices in North America.

Most brand webshops stayed open, so customers could still place orders. With ERP access restricted, staff used manual workarounds to fulfil selected orders while the rest of the backlog grew.

Once core infrastructure was restored, TAKKT gradually expanded system access. Teams began working through orders based on their size, urgency and importance to customers.

On 28 October, CEO Andreas Weishaar estimated that TAKKT could deliver at around 10% of its normal capability at that stage of recovery. Order processing, deliveries and invoicing were still restricted as teams restored access.

TAKKT expected a noticeable impact on fourth-quarter sales, earnings and cash flow. Management warned that organic sales growth and adjusted EBITDA margin could fall below its existing guidance ranges. It also reported a higher risk of negative free cash flow for the year.

The nine-month results covered the period through 30 September, before the attack. Management said the pace of recovery would help determine the full-year impact.



ENTERPRISE AI

READ FULL STORY

# DATABRICKS GENIE BRINGS SAP ERP DATA INTO CHATGPT

*Employees can analyse SAP data shared with Databricks, with answers governed by their access permissions and linked to the underlying sources.*

Companies can use SAP Business Data Cloud Connect to share selected SAP data products with Databricks. The workspace can query the published data without maintaining a separate copy. Unity Catalog governs which data each user can access.

A ChatGPT administrator makes the Genie plug-in available, and employees sign in with their own Databricks accounts. ChatGPT passes the question to Genie, which uses the organisation's business definitions and runs the analysis inside Databricks.

Genie can generate and run a SQL query when needed and return links to its sources. How current the answer is depends on when the underlying data was last refreshed.

A buyer could ask which late purchase order lines threaten next week's production. A partial delivery can leave a shortage, so the analysis needs to consider the remaining quantity and the date the material is needed.

A controller could use Genie to investigate a margin shortfall and follow the source links to the underlying postings. The result depends on the business definition used for margin and which ledger, currency and adjustments it includes.

The plug-in supports analysis. If the buyer decides to expedite an order or a planner needs to adjust stock, the change goes through a separately authorised ERP workflow.




CUSTOMER STORIES

READ FULL STORY

# JULIAN SOLER USES AI
## TO RANK GRAPE RECIPES IN ABAS ERP

*The Spanish grape ingredient producer uses Forterro's MyForterro.ai to compare raw material blends by cost and fit with customer specifications.*

JULIAN SOLER supplies grape juice and concentrated grape must to food and beverage manufacturers in more than 60 countries. Forterro says the Spanish producer manages more than 1,000 items and handles 30 to 40 production runs a day.

Staff previously calculated blends in spreadsheets. The new tool uses production, laboratory and quality records in Abas ERP to identify viable combinations of raw materials for each run.

The optimiser ranks blends by cost and how closely they meet the customer's specifications. The underlying batch checks include concentration, acidity, pH and colour, giving production and laboratory teams a basis for comparing the options.

The project began at a two-day Forterro hackathon. JULIAN SOLER staff configured the agent, refined its prompts and selected AI models with support from Abas specialists. Production and laboratory teams review the ranked options before choosing a recipe.

The producer expects to save four to eight hours a day on recipe calculation and review. Forterro's November announcement gives that figure as a target. Measured savings from day-to-day use are still to come.

JULIAN SOLER also plans to explore processing supplier delivery notes received as PDFs and building agents that work with raw material records in Abas ERP.




ENTERPRISE AI

READ FULL STORY

# KINDO'S DEEP HAT SIFT
## FILTERS ALERTS BEFORE AI AGENTS ACT

*The service screens alerts, tickets and logs so agents spend fewer model calls on events they are likely to dismiss.*

Deep Hat Sift sits between an incoming event stream and a Kindo AI agent. Teams set up each filter for a specific source and task, such as deciding which reported phishing messages warrant investigation.

Reviewers start with about 50 sample events from that source and decide which deserve attention. In shadow mode, Sift scores incoming events while the agent continues to review them.

Operators can then see how many agent runs a proposed threshold would avoid and how many events the agent judged actionable it would have withheld. An authorised person approves the threshold before live filtering begins, and Sift records the reason for that decision.

Once live filtering starts, Sift sends a random sample of events it would otherwise withhold to the agent for review. The default sample is 3%, and operators can adjust it between 1% and 5%.

Sift uses the agent's verdicts to estimate how many actionable events the filter misses. If a reviewer corrects a verdict, the corrected judgement replaces the agent's original assessment in the reported figures.

By default, Sift returns to shadow mode if performance drops below the approved limit. The agent resumes reviewing incoming events while the team checks whether the threshold still suits the queue.




ERP MIGRATION

READ FULL STORY

# SAP OUTLINES SEVEN FAMILIES
## OF AI AGENTS FOR ERP MIGRATION

*The planned assistants cover work from assessing a source landscape and preparing its data to testing and local rollout.*

SAP's seven Migration and Modernization Assistants use SAP Cloud ALM to coordinate migration work. System Analysis maps the existing landscape and its dependencies. Data Management ranks data quality issues by business impact.

Custom Code reviews ABAP extensions and proposes or applies supported fixes. Business Configuration compares existing settings with the requirements of the target system. Test Management uses business processes and project requirements to prepare test cases.

ALM Project Management is designed to track risks and dependencies. The Rollout Assistant compares the global ERP template with local requirements before go-live.

Four assistants were already in use on early-adopter projects, covering data, custom code, configuration and testing. In a November interview published by SAP, Sonja Liénard said the company aims to release more migration tools by the end of 2026.

The custom code tools can also help review existing extensions outside a migration. In a migration project, a pricing routine might pass a code check and still calculate a different discount. Comparing the outputs in a test system helps teams catch that difference.

Liénard also described the need for defined agent permissions and an audit trail showing who initiated an action, what instructions the agent received and what it changed.




PRODUCT UPDATES

READ FULL STORY

# KATANA EXPANDS REPLENISHMENT WITH AI AND NEW WAREHOUSE CONNECTIONS

*Inventory teams can flag a likely shortage, compare reorder quantities and bring information from third-party warehouses into the planning process.*

Katana flags a likely shortage by comparing stock on hand and expected receipts with demand over an item's replenishment lead time, plus a safety buffer. It estimates daily demand from the previous 30 days of sales or production consumption.

From a warning, buyers can open a 12-month forecast and compare three suggested order quantities. The forecast uses sales history, current stock and open orders alongside settings such as lead times and minimum order quantities.

Buyers can turn a recommendation into a draft purchase or manufacturing order and send it for approval. Katana also announced automatic order creation, with the rules and availability still to be specified.

Katana's setup guide lists warehouse and fulfilment connections including ShipBob, ShipHero and Mintsoft. Businesses map each warehouse to a Katana location and match products by SKU. Depending on the provider, they can bring in orders, stock balances, shipment tracking and inbound deliveries.

Most providers send updates at least hourly, according to Katana. The warehouse count appears alongside Katana's recorded balance so teams can see where the figures differ.

Katana adjusts its own inventory balance when reconciliation runs. Teams can schedule it daily or weekly, or start it manually. For a buyer reviewing a reorder, the last reconciliation shows how recently the two balances were aligned.




ENTERPRISE AI

READ FULL STORY

# IBM AND MICROSOFT INTRODUCE IMAGINE ENTERPRISE AI AGENTS

*The companies' first industry frameworks cover insurance, financial services and retail, with controls for deciding where a person must intervene.*

IBM and Microsoft introduced Imagine Enterprise on 10 November. The platform connects AI agents to existing business systems and lets companies set rules for which actions can proceed automatically and which need human approval.

In IBM's insurance example, an agent called Digital Steward checks claims against policy information and flags signs of possible fraud. It can send a straightforward claim to a junior adjuster and refer unclear coverage to a senior colleague.

Claims with several warning signs can go to specialist investigators. The agent explains why it routed the case and suggests a next step. The adjuster makes the decision.

IBM says the platform logs what agents do and when they hand work over to a person. IBM Consulting contributes more than 6,000 prebuilt agents and other assets. Microsoft provides Foundry and Copilot Studio to coordinate agents, Azure for hosting and Entra for identity management.

Customers can have IBM Consulting deploy and operate the platform, work with the consultancy on implementation or manage the platform themselves.

Financial services provider SEI is working with IBM Consulting and Microsoft to assess where AI agents could support critical processes. The companies gave no timetable for an Imagine Enterprise rollout at SEI.



SECURITY

READ FULL STORY

# SAP'S NOVEMBER SECURITY UPDATE

## FIXES FOUR VULNERABILITIES RATED 10.0

*SAP released 35 new security notes on 10 November, including critical fixes for Web Dispatcher, Gateway and components of NetWeaver AS ABAP.*

Two of the four vulnerabilities rated 10.0 affect components that handle web traffic. SAP Note 3778530 fixes memory corruption in the Internet Communication Manager for NetWeaver AS ABAP (CVE-2026-76964).

SAP Note 3778556 fixes a separate memory corruption flaw in Web Dispatcher, which routes requests to SAP application servers (CVE-2026-89126). Both flaws could allow code to run remotely on affected systems.

SAP classified nine of the 35 new notes as Critical. The other critical fixes cover components including NetWeaver Knowledge Management, S4CRM and Web Intelligence in SAP BusinessObjects.

The other two 10.0 fixes address access and authentication. SAP Note 3798345 fixes an access-control weakness in SAP Gateway (CVE-2026-89103). Note 3849308 adds a missing authentication check to the SAML 2.0 service provider in NetWeaver AS ABAP and ABAP Platform (CVE-2026-120017).

SAP also published four GitHub security advisories, including fixes for its Python and JavaScript SDKs, and updated three earlier notes covering SAP GUI for HTML and SAP WebClient UI.

SAP's bulletin lists the affected versions for each fix. That lets teams match the notes to the components installed in their own environments.




ERP & CLOUD

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# SYSPRO ERP UPDATE ADDS
## TRACEABILITY AND TIGHTER ORDER CONTROLS

*The release brings a configurable product record, actual-weight costing and sales order validation into the manufacturing ERP.*

Syspro announced general availability of its ERP update on 2 November. Unified Product Traceability extends existing lot and serial tracking by linking product records to events such as receiving, production and shipping.

Businesses can specify what to record at each event and location. The framework helps teams spot incomplete records and reconstruct a product's history when preparing for an audit or investigating a recall.

Syspro says the framework supports recordkeeping associated with Section 204 of the US Food Safety Modernization Act and the EU Digital Product Passport. The records a business needs depend on the products it handles.

The Catch Weight feature records both the order quantity and the measured weight. A food processor can receive goods by the carton and use their actual weight to calculate inventory value and production costs.

Sales orders can stay in Draft while Syspro Torque checks them against business rules. Draft orders leave stock available. Teams must fix blocking errors before release and can accept warnings with a recorded reason.

The update also lets teams make exceptions for individual customers when company policy restricts sales to products listed in active contracts. The restriction continues to apply to other customers.




FINANCIAL REPORTING

READ FULL STORY

# SAGE INTACCT R4 OPENS ITS FINANCE INTELLIGENCE AGENT

*The agent is generally available in six markets. Connected Excel reports and custom transaction approvals are offered through separate Early Adopter programmes.*

Sage Intacct R4 makes the Finance Intelligence Agent generally available in Australia, Canada, Singapore, South Africa, the United Kingdom and the United States. Users can ask questions about their Intacct data in plain language through Sage Copilot.

A finance user could ask which suppliers have overdue bills and then open the analysis panel to see more detail on how Copilot reached its answer. Sage also says the agent can analyse figures and flag potential trends.

An administrator must enable the agent and assign permissions. A user asking about overdue supplier bills needs permission to view the underlying accounts payable records.

Connected Reporting for Excel lets finance teams build workbook reports linked to Intacct and refresh them when they need updated figures. Sage offers it to selected Early Adopters in Canada, the United Kingdom and the United States.

A separate Early Adopter programme covers custom approvals for customer invoices and Order Entry transactions. Administrators can route records to an individual or group and review pending requests and approval history.

The rules use fields from the transaction header and run in the order set by the approval policy. Sage's release notes say teams cannot edit a rule once it has been created.




CUSTOMER STORIES

READ FULL STORY

# BOMBARDIER CUTS HOURS
## FROM AIRCRAFT RANGE CALCULATIONS

*Sales teams can use Clara to check how an aircraft would perform on a proposed trip while they are speaking with a customer.*

Bombardier built Clara on Salesforce Agentforce so sales teams could explore aircraft performance during customer conversations. The range for a proposed trip depends on factors such as passenger load, the departure airport, runway conditions and winds.

Clara queries Aircraft Performance Group for runway data and uses Bombardier's own models to calculate range. The result appears in Salesforce as an interactive map rendered with Azure Maps.

For questions about aircraft specifications and comparisons, Clara can search more than 500 technical documents. Sales staff can consult that material from the same CRM interface they use to explore a proposed trip.

Salesforce says Clara can generate a range map in 10 to 20 seconds. That specific calculation previously took at least four hours of engineering work, often with further exchanges if the customer changed the trip details.

A salesperson can now adjust the passenger count or try a different departure airport during the discussion. Clara saves the assumptions and earlier results, so the salesperson can compare scenarios and see what changed.

Bombardier deployed Clara in 15 weeks with Salesforce's support and is extending access to more than 300 sales team members worldwide.




ENTERPRISE AI

READ FULL STORY

# WM SYNERGY LAUNCHES AI UNIT
## FOR MANUFACTURERS AND DISTRIBUTORS

*The consultancy will help customers decide where to use AI with the ERP they already run, starting with order entry, cash application and planning exceptions.*

WM Synergy launched its AI Business Unit on 27 October. Led by Michael Canty, the team brings together ERP consultants and AI engineers to work with small and midsize manufacturers and distributors.

The team helps clients choose which workflows to address first. It checks what their ERP and related applications can already do, then assesses where an add-on or a custom agent could fill a gap.

WM Synergy can also deploy InsightsAI, its own tool for asking questions about ERP data in plain language. The company lists Infor VISUAL, Infor CloudSuite Industrial, Infor XA and Acumatica Cloud ERP among the supported systems.

Businesses need to define the figures an AI tool uses. Estimated margin at the quotation stage can rely on different costs from the final margin calculated after a job closes. Both figures can be useful when the tool makes clear which one it is using.

Clients decide what an agent can access and change. In material planning, an agent might flag a shortage using open orders, stock and expected receipts. Changing a purchase order or rescheduling production requires separate permission.

WM Synergy reported that one AI-assisted data migration took three hours, compared with 120 hours previously. The company gave no details about the scope of the migration.




RESEARCH & REPORTS

READ FULL STORY

# MANUFACTURERS WANT AI AGENTS
## THAT CAN WORK ACROSS APPLICATIONS

*A Rootstock-commissioned survey found broad interest in cross-application agents, alongside lower confidence in ERP readiness.*

Researchscape surveyed 588 manufacturing professionals for Rootstock. Respondents worked at organisations with at least 100 employees in the United States, United Kingdom and Canada. Of those surveyed, 88% saw some value in a single AI agent that could work across business applications, and 58% rated it very or extremely valuable.

Some 64% said their organisations already had AI in pilot or operational use. Among respondents deploying AI, 31% said they were using agentic AI.

Looking ahead, 77% said their organisations planned to commit more money or resources to AI tools over the next 12 to 18 months.

Only 43% of respondents were very or extremely confident that their ERP could keep pace with AI-driven changes. Some 73% preferred AI that takes direction from people or acts within defined limits and escalates when needed. Fully autonomous AI was the preference of 13%.

Employee training was the most common responsible AI practice, reported by 40% of respondents. A quarter reported using none of the practices listed in the survey.
In purchasing, those limits could let an agent identify production orders affected by a supplier delay and suggest a response. A buyer could then review the proposal before changing the purchase order.



CUSTOMER STORIES

READ FULL STORY

# TOYOTA FINANCE AUSTRALIA
## REPLACES SAP ECC WITH PUBLIC CLOUD ERP

*The lender moved to SAP S/4HANA Cloud Public Edition after 16 years on ECC, giving finance users more control over reporting.*

Toyota Finance Australia went live in early August 2026 after a 13-month implementation called Project Kizuna. Before committing to public cloud, the team reviewed which systems depended on SAP ECC and whether the new setup could support the lender's existing operations.

That review mattered because SAP's public edition handles customisation differently. It uses supported extension tools and published interfaces so customer-specific changes can work alongside upgrades managed by SAP.

The team also made staff readiness a priority. Alongside the technical work, employees needed to prepare for new ways of working in the ERP they would use after go-live.

Moulik Doshi, the lender's head of financial reporting and operations, described the migration at the SAP NOW AI Tour in Sydney. Finance users can now build reports and dashboards that previously required help from data specialists.

SAP's public edition includes reporting tools that let users adapt standard queries with different fields and filters. For a finance team, that can mean creating a new view of existing ERP data to answer a specific question.

Doshi said the company was still learning how to use the platform. He described the change in how staff build reports, with figures for reporting turnaround and month-end close yet to be disclosed.




ERP INTEGRATION

READ FULL STORY

# SHIPSTATION EXPANDS ITS ACUMATICA SHIPPING INTEGRATION

*The update adds packaging recommendations and conversational analytics to fulfilment workflows connected to Acumatica's cloud ERP.*

Acumatica holds the inventory and sales order records, while ShipStation handles shipping. The expanded integration adds tools for choosing packaging and filling in shipment details. ShipStation also becomes a preferred fulfilment solution for Acumatica customers.

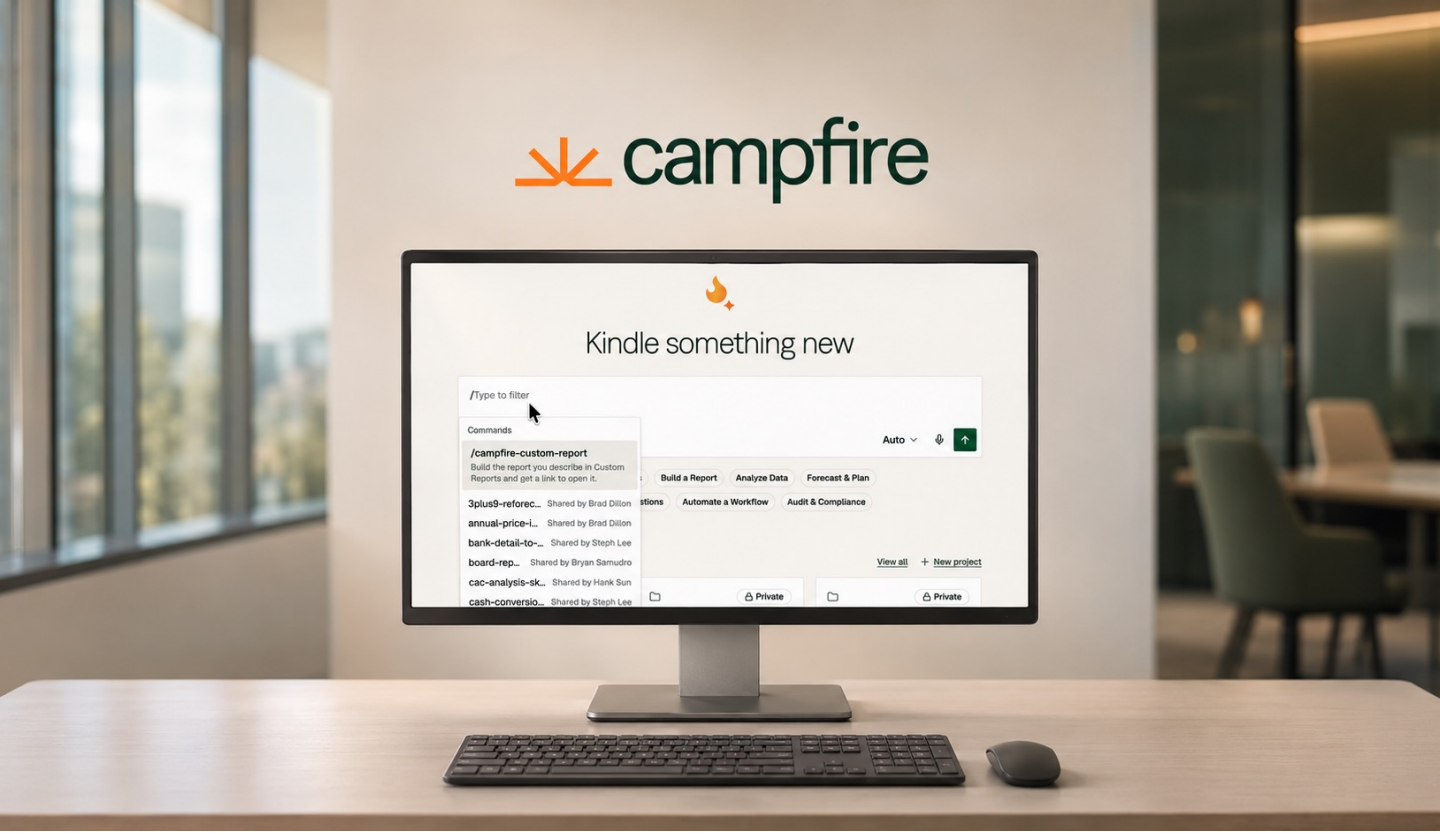
Auto-fill checks the two most recent shipments with the same combination of items. It reuses their weight and dimensions if both shipments match. Existing product defaults and automation rules take priority.

The packing tool uses recorded product dimensions and weights to suggest how items could fit into the available boxes, with the aim of using fewer packages. Warehouse staff can review the recommendation before applying it.

In the ShipStation dashboard, teams can ask questions about their shipping data in plain language. They can compare costs by carrier or service, check delivery performance and investigate returns or delays in processing orders.

The update also includes address validation before a shipping label is created. Separate tools help teams identify unused or voided labels they may be able to claim refunds for.

ShipStation says the expanded integration is available globally to new and existing Acumatica customers. Its documentation directs users to ShipStation Labs for access to conversational analytics, which works with the shipping data held in ShipStation.




FINANCIAL REPORTING

READ FULL STORY

# CAMPFIRE EMBER CREATES SAVED REPORTS FROM CHAT

*Finance teams can describe a report in Ember and continue editing it in the conversation once it is saved in Campfire ERP.*

Finance teams tell Ember what they want to see in a report. Ember creates it in Campfire ERP and returns a link. The report opens in Custom Reports with the period, entity and filters set.

In Campfire's demo, the user asks for spending by vendor across operating expenses and cost of goods sold. The request specifies the reporting period and asks Ember to list the largest totals first.

Ember can create transaction reports, income statements and balance sheets. For financial statements, users can also group accounts, hide rows and add formulas such as assets minus liabilities.

Follow-up requests update the same saved report. In the demo, the user asks for a monthly breakdown, and the report reopens with payees listed down the side and months across the top.

Finance teams can open the result in Custom Reports to make further adjustments or download it. Before using a report in a recurring review, they can check whether its accounts, filters and formulas reflect the original request.

Campfire had already introduced AI-generated reports earlier in 2026. The November update details how the new command creates a saved report and lets users revise it from the same conversation.




EXECUTIVE APPOINTMENTS

READ FULL STORY

# ROOTSTOCK APPOINTS FREDERICK LI AND PROMOTES OHAD IDAN

*Li will lead product strategy, while Idan takes responsibility for AI and platform engineering at the manufacturing ERP company.*

Rootstock Software named Frederick Li Chief Product Officer on 9 November. He will set product priorities for its cloud ERP as the company develops AI capabilities for manufacturers and distributors.

Li brings more than 15 years of experience in business software. He was Chief Product Officer at Fishbowl Inventory and spent more than six years at BlackLine, where he led product management for financial close software. He also held product roles at CoreLogic.

Rootstock began testing AI tools with selected customers in August. They help sales teams assess fulfilment dates and buyers identify orders at risk from supplier delays.

Ohad Idan was promoted to Senior Vice President of AI and Platform Engineering. He will oversee how Rootstock's engineering teams use AI to develop and deliver software. He will also continue working with customers and oversee the technical side of key platform partnerships.

Idan joined Rootstock as Vice President of Product in November 2025, when the company acquired Praxis Solutions, the Salesforce consulting and implementation firm he founded.

Rootstock expects Li and Idan to work together to bring new capabilities to customers faster. The November announcement gave no timetable for expanding access to the sales and purchasing tools under pilot.




EXECUTIVE APPOINTMENTS

READ FULL STORY

# ESKER NAMES MATTHIAS GOEHLER
## CHIEF PRODUCT OFFICER

*The former Zendesk and SAP executive will lead Esker's global product strategy and advance its roadmap for AI in finance.*

Esker announced Matthias Goehler's appointment as Chief Product Officer on 28 October. He brings more than 25 years of experience in enterprise software and digital transformation. He was previously CTO for EMEA at Zendesk and spent 16 years in senior product and strategy roles at SAP.

Goehler will oversee Esker's global product roadmap and align development priorities across research and development, marketing and sales. His remit includes advancing the company's AI capabilities for finance teams.

Esker also wants customers to play a greater role in product development. Goehler said he would create more opportunities for customers to work directly with Esker on new capabilities.

The appointment follows Esker's launch of its Synergy Agentic Framework for source-to-pay and order-to-cash. Permissions and approval rules govern how agents handle tasks such as invoice exceptions and collections, including when a person needs to step in.

In Esker's survey of 338 finance leaders, 66% wanted AI to guide or support most finance decisions within a year. At the same time, 90% had policies against unapproved AI use or were developing them.

For Goehler, a practical product decision is where approval should sit in everyday finance workflows. Esker has yet to announce a release timetable for additional agent capabilities.




ENTERPRISE AI

READ FULL STORY

# GOOGLE OPENS S&P GLOBAL DATA PREVIEW IN GEMINI ENTERPRISE

*Google Cloud's public preview lets users ask questions about company financials, filings and earnings calls through S&P Global Adaptive Retrieval.*

Gemini Enterprise sends each question to the S&P Global data agents the user's account can access. It builds an answer from the information they return, which can include company financials, filings and earnings call transcripts.

A corporate research team could use the connection to prepare for a supplier meeting. It might compare a company's reported capital spending with what management said about future investment on its latest earnings call.

Google says Gemini Enterprise can combine S&P Global results with material from other connected sources. That lets an analyst consult external research and internal documents in the same workspace while checking the context behind the figures.

An administrator must create a data store, attach it to a Gemini Enterprise app and authorise the connection. Google manages the OAuth setup. The information users can retrieve depends on the permissions of their S&P Global accounts.

Gemini Enterprise sends the query directly to S&P Global's Adaptive Retrieval API. Google notes that third-party providers may associate a query with the user's identity, and that searches may reach multiple providers if several external sources are enabled.

Google opened the connector in public preview on 30 October for Global, U.S. and EU locations. Teams can use the preview to see how well it finds relevant material for their research.



ERP MIGRATION

READ FULL STORY

# SAP MIGRATION ASSISTANTS
## ENTER EARLY CUSTOMER PROJECTS

*Four tools are supporting cloud ERP transformations, with a focus on data preparation, testing, custom ABAP code and configuration.*

SAP said on 28 October that early adopters were using four migration assistants in cloud ERP projects. The Data Management Assistant ranks data quality issues by business impact and supports both guided and automated corrections.

The Test Management Assistant uses business processes and requirements to define test scope, draft cases and identify the data needed to run them. It sends cases to SAP Test Automation by Tricentis for execution.

The Custom Code Assistant reviews ABAP extensions, applies supported fixes and suggests further changes. The Business Configuration Assistant compares existing settings with target requirements, flags differences and keeps an audit trail of changes.

AkzoNobel is using the Data Management Assistant as it consolidates its ERP systems through RISE with SAP. Its team uses the tool to identify data quality problems and decide which to fix first.

AkzoNobel reported less time spent on analysis and faster planning. The announcement gave no figures for either improvement. Project teams still need to validate data corrections, code changes and configuration decisions before deployment.

SAP described the four tools as being in early customer use. It also outlined three planned assistants for analysing existing systems, identifying project risks and adapting global templates to local rollout requirements.




CUSTOMER STORIES

READ FULL STORY

# BRENNAN BUILDS ERP WORKFLOWS
## IN NETSUITE WITH CLAUDE CODE AND CODEX

*AI helps Brennan Industries develop custom tools. The resulting applications run inside NetSuite and support tasks such as recording sales conversations.*

Sales staff at the hydraulic components manufacturer could look up prices and delivery details during a call. Recording the conversation in CRM meant opening other screens, so details that could help with follow-up often went unrecorded.

Ryan King, the company's chief information officer, said he built a sales screen in an afternoon that combines both tasks. Employees can answer the customer's question while the application records the interaction in NetSuite CRM, giving the team a history to refer to later.

For other customisations, King gathers requirements from users, builds a mock-up in about 45 minutes and revises it after their review.

The applications run as SuiteScript, NetSuite's JavaScript-based API for customising the ERP. Claude Code and Codex help during development. Once deployed, the scripts handle repeatable tasks inside NetSuite without a new model call each time.

King says developers still need detailed knowledge of NetSuite to guide the coding tools. They must know which records the application should update, what data it should capture and how those updates fit into the existing workflow.

SuiteScript can validate inputs and trigger processing when records change. The team deploying a custom application still has to decide who can use it and how to test future changes before they reach production.




ENTERPRISE AI

READ FULL STORY

# SNOWFLAKE EXPANDS AGENT WORK
## AND TIGHTENS SPENDING CONTROLS

*The Expedition announcements cover shared business definitions, oversight of agent access and recurring tasks for data teams.*

Snowflake's Business Ontology, part of Horizon Context, is due to enter public preview. It will let teams link an approved definition, such as net revenue, to the tables and views behind it, assign a business owner and keep a record of changes.

Cortex AI Gateway is generally available. It gives administrators a central place to manage how agents connect to tools and track their activity. Teams can attribute usage to the teams or cost centres responsible for it and set limits on spending.

Availability varies across the gateway's newer features. MCP Tools is in public preview. Agent Abuse Detection, Agent Trace Intelligence and Dynamic Model Routing are in private preview.

Data teams can schedule CoCo to run pipeline health checks and investigate failed jobs in isolated, Snowflake-managed environments. If CoCo proposes a fix, an engineer can review it before it reaches production. The GitHub integration, in public preview, brings proposed changes into the team's existing code review.

CoCo records scheduled runs so teams can review what happened, suspend a task or rerun it. CoWork can also handle recurring analysis, such as preparing a weekly sales report.

Snowflake says its planned CoCo and CoWork bots would take on broader goals and work in the background, asking for sign-off at critical steps. The bots are slated for private preview, with no general release date announced.

ERPNEWS

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