

integraERP Suite 3.09

AI enabled Purchase Order Improvements

Scheduled Updates Available Beginning September 22, 2026

This release includes significant enhancements for Purchase Orders. Customers will want to watch the training videos available to learn about the changes. The changes provide greater flexibility for matching vendor invoices to the products received across multiple receiving events. This release includes our first AI enabled integraERP feature where we use AI to extract information from vendor invoices to make invoice costing extremely simple.

Purchase Order Enhancements – New to integraERP 3.09

In integraERP 3.09, we have completely overhauled the relationship between Purchase Order Receiving and PO Costing. Previously, users faced challenges when a vendor sent a single invoice that covered multiple different shipments, as the system required you to create multiple transactions to process that one invoice.

To solve this, we've changed the Purchase Order features to separate the receiving events from the costing events. This transitions the system from a strict one-to-one relationship to a highly flexible many-to-many model.

[Customers Upgrading to 3.09 – Click here for Video](#)

[New Customers Starting with integraERP 3.09 – Click here for Video](#)

[PO Summary UI – Click here for Video](#)

AI Enabled Drag & Drop Invoice Costing – Paying a vendor invoice just got really easy. Just drag and drop the document from the vendor onto a PO Costing screen accept the document mappings to the related PO and your done!! This release uses artificial intelligence (AI) to extract the data from the vendor invoice and make available directly in PO Costing.

- **PO Header Automation:** Dragging an invoice onto the PO Header automatically opens the PO Costing Event, populates critical fields (like invoice number and due date), and costs the lines.
- **Intelligent Line Matching:** Added UI instantly matches the recognized invoice lines directly to your existing PO lines.
- **Automated Record Keeping:** For easy auditing and historical reference, both the original vendor invoice and the extracted data file are automatically attached to the PO Costing Event.

Note: There may be minor additional charges to use 3rd party AI document intelligence features in the future but at least through 12/31/2026, or the first 30 days of usage after the upgrade, there will be no additional fees. The feature will be turned on by default with the upgrade.

PO Workflow Changes – Here’s how the changes support a more flexible workflow:

- **Release 00 (The Original PO):** Release 00 now strictly represents the original purchase order sent to your vendor.
- **Releases 01+ (Receiving Events):** When you perform receiving against Release 00, those received lines now become Release 01, 02, 03, etc., representing distinct receiving events.
- **Flexible Costing Events:** Costing events are now created independently by selecting specific received lines that match your vendor's invoice. You can now cost lines from any receiving event at any time.

Purchase Order Dynamic Views – There are now 4 different dynamic view for Purchase Orders including: PO Costing Events, PO Ordered, PO Overview, and PO Received.



New PO Overview UI – This view is your one stop shop for the purchase order. It ties together all receiving and costing events for the PO into one UI. The lines tab provides information about product lines from across all receiving and costing events.

Status Indicators: **Receiving Complete** **Costing Not Started**

The PO status of "Invoiced" has been replaced by an overall receiving status and costing status available in the PO Overview dynamic view or the PO Overview screen.

PO Entry & Receiving Enhancements – We have removed the release number from the UI. With the change you can only have ONE receiving document open at a time for the PO. The system will automatically manage the creation & completion of receiving events (releases). We will no longer receive inventory against the 00 release as this will stay in the Ordered or Printed state. Users can now also change vendor up until it's costed.

integraERP - MAYFLOWER DISTRIBUTION - Purchase Orders-Posting-Receiving

★ **Maintain Mode**

Header Line Items TAN

PO Number: 10015

Date: 091826

Vendor Number:

Type:

PO COSTING ENHANCEMENTS

New Spreadsheet User Interface – To make managing this new flexibility easy, we have introduced a new spreadsheet-like user interface called Multi-Product Add. This allows your team to easily pick and choose specific POs, and the individual lines from those POs, to include together in the creation of a Costing Event.

integraERP - MAYFLOWER DISTRIBUTION - Purchase Orders Costing Multi-Product Add PO 11159 - Costing Event 00 - Vendor: 1001 - MASTER INDUSTRIES

PO Number: 11159 Costing Event: 00 Total Units: 342.00 Total Weight (lb): 75.00 Invoice Amount / Costed / Difference (USD): / 3175.81 /
Freight Proof: 0.00 Discount Proof: 0.00 Addon 1 Proof: 0.00 Addon 2 Proof: 0.00 Addon 3 Proof: 0.00 Addon 4 Proof: 0.00

Search...

Use Release Quantities Reset Add Selected Remove Selected Unselect All Select All Save All

Vendor Stock No	Line Num	Description	Product	Qty Received	Qty To receive	Qty Previously Costed	Qty To Cost	Ordered Cost	Amount to Cost	Cost Diff	Cost Most Recently Costed	Added	Sel	Action
1001	15	COLOR PROTECTION SHAMPOO FULL	1001	100.00	0.00000	0.00000	100.00	18.61636	18.62	0.00000	0.0	Yes	☐	Update Prev Costed
1002	30	NEW IMPROVED CONDITIONER	1002	55.00	0.00000	0.00000	55.00	5.85000	5.85	0.00000	0.0	Yes	☐	Update Prev Costed
1003	45	THIS PRODUCT	1003	87.00	0.00000	0.00000	87.00	5.66000	5.66	0.00000	0.0	Yes	☐	Update Prev Costed
1004	60	WIDGET 1004	1004	100.00	0.00000	0.00000	100.00	5.00000	5.00	0.00000	0.0	Yes	☐	Update Prev Costed

Total Count: 4 342.00

1 - 4 of 4 items

integraERP - MAYFLOWER DISTRIBUTION - Purchase Orders-Posting-Costing Event

★ **Maintain Mode**

Header Line Items TAN

Line Number: 1

Cost: USD

Unit Disc: %

Cost Basis:

Quantity To Cost:

Reference:

Product:

Description:

Warehouse:

Purchasing Unit:

Weight:

Order-For Number:

Maintain Item **Multi-Product Cost**

PO Costing Event Multiple Lines

PO Costing Event Line

Enhanced PO Costing Add-Ons – we have expanded the capabilities for posting additional costs like tariffs, taxes, and setup fees during batch invoicing.

- **Increased Capacity:** We have increased the number of available add-ons from one to four.
- **Enhanced Flexibility:** Similar to Order Entry (OE) add-ons, these new slots feature soft-coded titles and default General Ledger (G/L) accounts.

	[USD]
Freight	.00
Discount	.00
Addon 1	.00
Addon 2	.00
Addon 3	.00
Addon 4	.00
Net Addons	.00
Vendor Invoice Total ..	

PO Costing Event Header

When Upgrading to integraERP Release 3.09

As part of the upgrade to Release 3.09 purchase orders created prior to Release 3.09 will be migrated to the new PO Receiving and PO Costing event structure. PO's that have not been costed will be costed using the new costing event features.

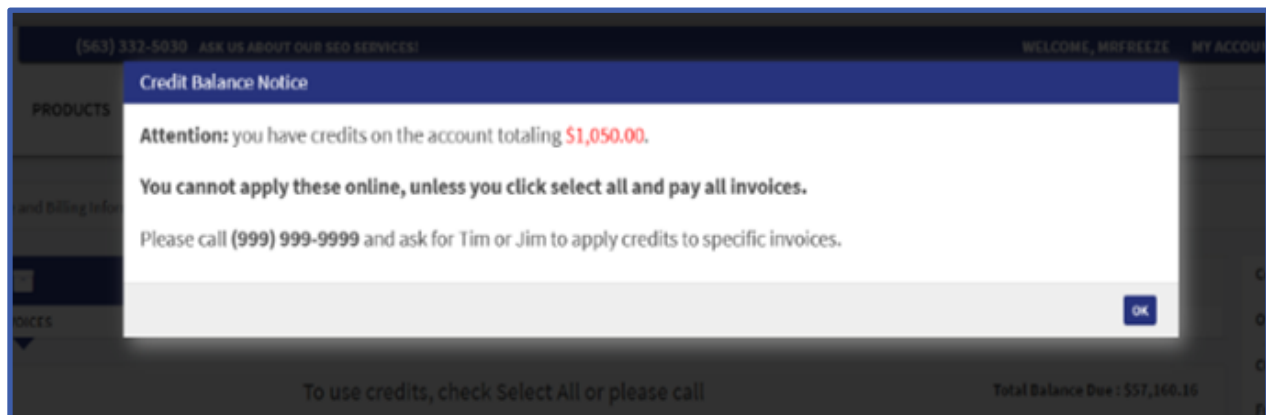
Work with your assigned integraSoft consultant for your upgrade to ensure your staff is trained and ready to use the new features prior to the upgrade.



integraE-Commerce 3.09 Specific Enhancements

Customizable Credit Balance Notifications– To help streamline the online payment process and reduce customer confusion, integraRental 3.09 introduces a new customizable Credit Balance Notification for the E-Commerce My Account Portal. Please contact integraSoft support to enable & customize the text in this popup, shown below.

- **Proactive Alerts:** When a customer logs into their "My Account" page, the system automatically detects if they have an open credit balance. If they do, a clear popup notification immediately alerts them to the available funds.
- **Payment Rule Clarification:** The popup serves as a helpful instructional guide, clearly explaining to the customer that credits can only be applied online if they use the "Select All" function to pay all open invoices at once.
- **Customizable Call-to-Action:** If a customer prefers to apply their credit to a single, specific invoice, the popup text is fully customizable to direct them to the right offline channel. For example, you can configure the text to provide a specific phone number and contact person (e.g., *"Please call (999) 999-9999 and ask for Tim or Jim to apply credits to specific invoices."*).



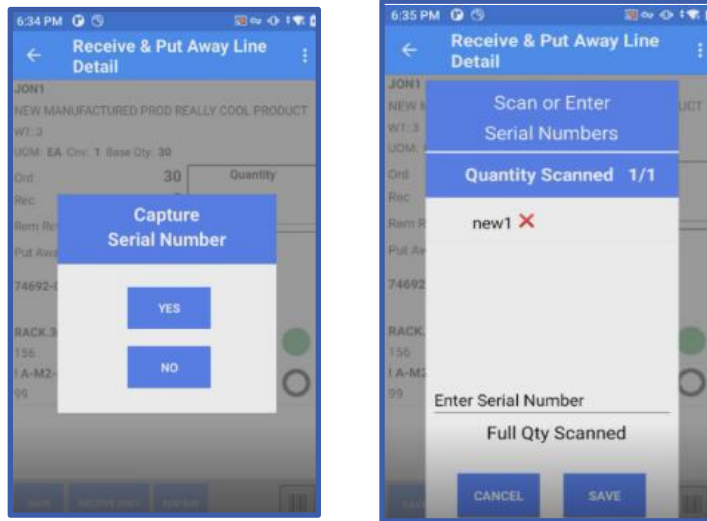
Hero Images for Group Landing Pages– iNextAdmin (ECOM Admin) users can now add a hero image to the group landing pages and customize the H1, H2, and alt-image tags for SEO, functioning exactly like the landing page and category page hero features.

Modernized Loading Animation - The legacy processing GIF has been replaced with a scalable, CSS-based bouncing dot animation featuring a frosted full-screen overlay, providing a cleaner loading UI that allows seamless adaption to the website's color scheme. *Note: reach out to integraSoft support to request adapting the new loading dots animation (currently black dots) to your website's color scheme.*

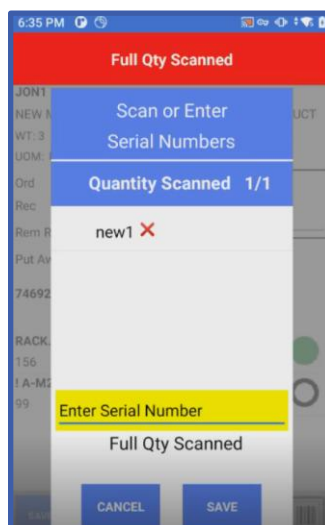
integraWMS 3.09 Specific Enhancements

Enhanced Serial Number Capture – Users can now capture, validate, and track serial numbers directly during the PO receiving process, creating immediate inventory traceability from the moment a product enters the warehouse.

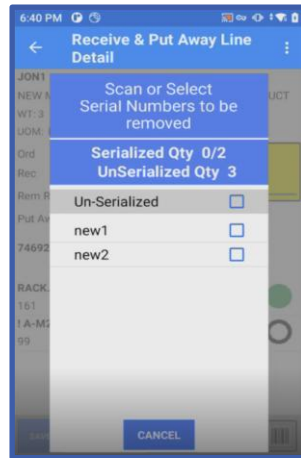
- **Serial Number Capture:** If a product is marked as serialized in integraERP/WMS, the system prompts users with guided workflows to scan or manually enter the serial numbers based on the quantity being received.



- **Real-Time Data Integrity:** Active validation prevents duplicate serial numbers from being entered and ensures the exact correct number of serials are captured before a receipt can be completed.



- **Targeted Unreceiving:** When reversing a quantity (unreceiving), the workflow now allows you to select the specific serial numbers to remove. It provides clear visibility into serialized versus non-serialized quantities and fully supports mixed scenarios where both exist within the same receipt.

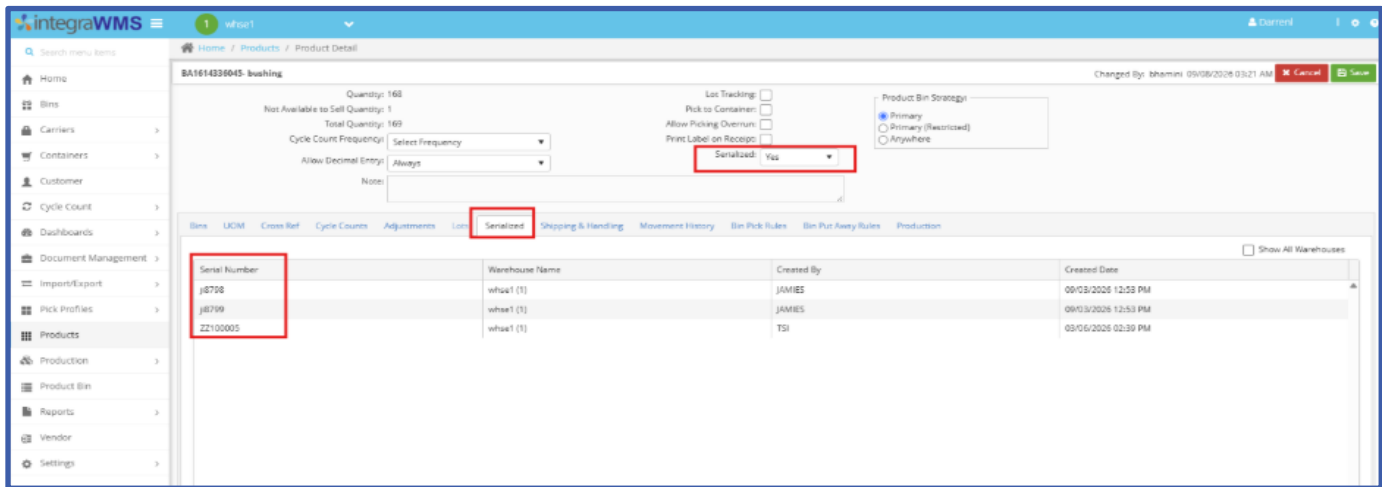


- **End-to-End Traceability:** Serial numbers are permanently stored and associated with the received inventory, reducing manual tracking, supporting future warranty processes, and strengthening audit compliance.

Centralized Serial Number Visibility – To make inventory research, troubleshooting, and auditing significantly faster, we have introduced a centralized hub for tracking serialized inventory directly within the WMS Admin dashboard.

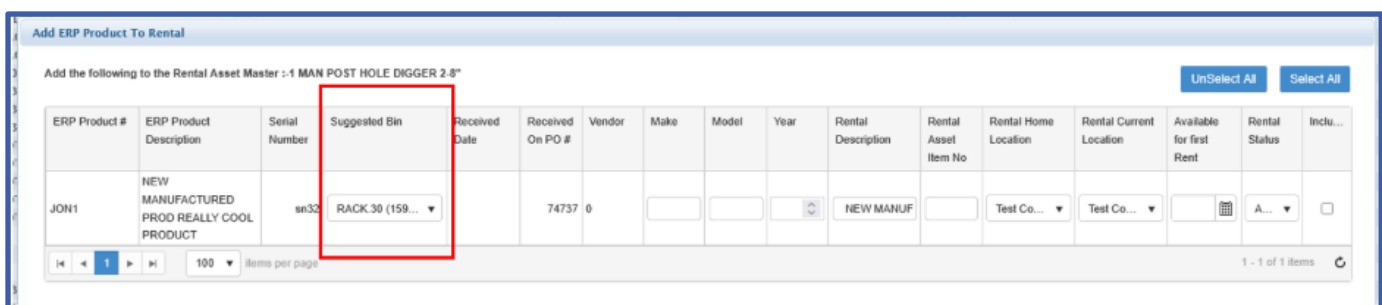
- **New Global Serial Number View:** Instead of clicking into individual product records to find information, administrators can now navigate directly to Products > Serial Numbers. This new global view allows your team to instantly search, verify, and trace serial numbers across your entire product catalog from a single screen.

- **Product-Level Tracking:** As always, once a product is flagged as serialized in the system, all associated serial data (including creation dates and specific warehouse locations) remains fully accessible on the individual item level under Products > Product Detail > Serialized Tab.



Add Inventory to Rental with WMS Integration – integraERP 3.09 introduces a unified approach to keeping your Warehouse Managed inventory in sync with ERP and Rental when moving inventory from ERP to the Rental Fleet. Previously this was a two-step process that required an update to the Warehouse Management System (WMS) after moving inventory to the rental fleet. For WMS users, the “Add To Rental” feature will suggest a bin by default but allow users to override and select the specific bin used to pull inventory from the WMS and add to the rental fleet. This solution exists for all three types of transfers to the rental fleet:

- **Adding Serialized Assets to the Rental Fleet**
- **Adding non-serialized Assets as Serialized Assets into the Rental Fleet**
- **Bulk transfer of non-serialized assets to the Rental Fleet**



Schedule Your Upgrade Consultation

integraERP 3.09 is designed to streamline your daily operations and support long-term growth. To review the new features and discuss an upgrade path that fits your workflow, reach out to your account manager or email sales@integrasoft.com.