

Rootstock Announces Summer '25 Release with AI-Powered ERP Agent, Streamlined Operations, and Expanded Financials

Enhancements empower customers with a modern grid that improves user experience, support for a 13-period fiscal calendar, and contextual ERP automation

SAN RAMON, CA, UNITED STATES, July 22, 2025 /EINPresswire.com/ --

Rootstock Software, a recognized leader in cloud ERP for product-based companies, today launched its Summer '25 Release. This update introduces a new AI-driven ERP Agent, powerful financial enhancements, and the debut of Rootstock's highly configurable grid designed for fast, flexible data interaction. Along with other key operational features, this release gives users greater control, automation, and intelligence across the enterprise.

"We're leading a new phase in ERP," said Rick Berger (<https://www.rootstock.com/about-erp-software-company/management-team/>), CEO of Rootstock Software. "Manufacturers and distributors are done with workarounds and complexity—they want intelligence built in. With our [AI-powered ERP Agent](#), expanded financial capabilities, and the launch of our improved grid, we're providing manufacturers with the capabilities to anticipate market shifts, accelerate decisions, and adapt with agility."

"CIOs and operational leaders want to modernize their enterprise, unify data on a common platform, and automate their day-to-day operations—that's exactly what we've enabled," said Robert Rostamizadeh, CTO at [Rootstock ERP](#). "With this release, we're delivering an ERP that saves time, supports data visibility, and boosts productivity across finance, inventory, and manufacturing operations."



The Summer '25 Release (<https://www.rootstock.com/press-releases/rootstock-software-announces-summer-25-release-with-ai-powered-erp-agent>) includes enhancements across four key areas:

1. **AI-POWERED ERP AGENT: CONTEXT-AWARE ERP AUTOMATION.** Rootstock introduces a new Manufacturing ERP Agent (<https://clouderp.rootstock.com/rootstock-erp-agents>), now in pilot. This conversational, context-aware agent helps users streamline core ERP functions—without leaving the Rootstock ERP home screen or navigating to different areas for various information. For example, with users providing spoken or typed-in prompts, the agent can:

- Summarize recent sales orders and identify customer-buying patterns.
- View and adjust inventory levels, including cycle count corrections and reallocations.
- Reflect scrap adjustments, create a supply order, and trigger replenishment.
- Search for work orders—or generate new ones based on real-time needs.

This new ERP Agent showcases how Rootstock is streamlining everyday processes—reducing clicks, improving accuracy, and enabling faster, more informed action directly within user workflow.

2. **FINANCIAL ENHANCEMENTS: GREATER FLEXIBILITY, AUTOMATION, AND CONTROL.** Rootstock continues to strengthen its [ERP financial module](#) with enhancements that streamline reconciliation, reduce manual effort, and support various accounting structures. Key enhancements include:

- **13th Period Support:** Enables configuration of a 13-period fiscal calendar—commonly used by retail, distribution, and manufacturers to align reporting with weekly business cycles. This structure supports more consistent operational comparisons and internal financial planning, especially in environments with high transaction volume.
- **Customer Refunds:** New flows allow for Accounts Receivable / Accounts Payable (AR/AP) offsets and vendor-to-customer refund processing. This feature addresses a customer-driven request through Rootstock's Idea Factory.
- **POAP Match Attachments:** Attach invoices and other documents within the POAP Match screen; files carry through to Payable Transactions for audit-readiness.
- **General Ledger (GL) UX Improvements:** A redesigned view now features contextual tabs, smart field groupings, and links to related records—making it easier to analyze and reconcile transactions.

3. **ROOTSTOCK GRID: A MODERN DATA EXPERIENCE.** The new Grid makes its debut, bringing high-performance data interaction to the heart of ERP workflows. Built for speed, flexibility, and personalization, this configurable grid architecture allows users to:

- Perform inline editing and navigate records quickly using keyboard shortcuts.
- Personalize filters, columns, and display settings that persist across sessions.
- Work within linked grids for seamless cross-record navigation.
- Select rows across multiple pages and apply advanced filtering and sorting.

- Tailor grid behavior and function with robust admin configuration controls.

4. OPERATIONAL ENHANCEMENTS: SMARTER PLANNING, WORK ORDERS, AND ROUTING.

Rootstock continues to strengthen core manufacturing and supply chain processes (<https://www.rootstock.com/cloud-erp/supply-chain-management-software/>) with updates that improve inventory replenishment, work order processing, routing logic, and documentation:

- Greater DRP Replenishment Control – Exclude Supplies & Demands: Users can now configure Distribution Requirements Planning (DRP) replenishment logic to exclude existing supplies and demands when calculating planned transfer or purchase quantities. This enhancement gives planners greater flexibility to manage location-level inventory based solely on desired stocking thresholds—especially useful in environments where supply and demand volatility can skew replenishment needs.
- Multiple Subcontract Operations per Routing: For divisions using Weighted Average Costing, users can now assign more than one subcontract operation to a single routing or work order—eliminating the need for artificial BOM levels and simplifying routing structure.
- Work Order Traveler for Disassembly and Labor-Only Orders: Users can now generate Traveler printouts for these specialized work orders, with logic that includes only relevant components and operations—improving documentation and streamlining execution.

The Summer '25 Release is now available to all Rootstock customers. Grid enhancements, ERP Agents, and financial updates will continue to expand in future releases.

ABOUT ROOTSTOCK

Rootstock Software (<https://www.rootstock.com/>) provides the leading ERP for product companies, empowering manufacturers, wholesalers, and distributors to turbocharge their operations. Natively built on the Salesforce Platform (<https://www.rootstock.com/salesforce-for-manufacturing/>), Rootstock is a modern, future-proof ERP with a fresh user experience. Users appreciate Rootstock's focus on customer success and its AI capabilities that offer a human-first approach. IT teams value Rootstock's platform as it minimizes the need to coordinate complex customizations and third-party integrations. All of these factors have contributed to delighted customers. As Rootstock continues to grow, stay tuned to the company's latest LinkedIn posts (<https://www.linkedin.com/company/2389168/admin/feed/posts/>).

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