

Rootstock Software Launches Summer '26 Release, Marking a New Era in AI-Driven ERP

Two new AI agents for manufacturing workflows enter active pilot; while enterprise security, Word export, and financial enhancements are fully available

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Rootstock Software, a leading provider

of cloud ERP for product-based companies, today announced its Summer '26 Release. Building on previous AI development, two new Rootstock AI agents enter active pilot with select customers. These agents are designed to help streamline delivery promises, lot traceability, and purchasing operations in real time. The release also introduces AccessGuard, Rootstock's enterprise security solution designed for midmarket manufacturers and distributors; it advances [Rootstock Financials](#) with significant new capabilities for organizations operating in complex, global environments, and delivers a customer-driven enhancement from the Rootstock Idea Factory.



Rootstock Software provides Cloud ERP solutions for manufacturers, wholesalers, and distributors.

"Manufacturers and distributors don't have the IT bandwidth to stitch together a dozen point solutions to get AI working inside their operations," said [Rick Berger](#), CEO of Rootstock Software. "Because AI is architecturally embedded in the platform our pilot customers already run on, they were able to implement these agents without the complexity that comes with bolting AI onto existing systems. That's what makes these agents simple yet powerful, setting a new standard for AI-driven ERP."

Rootstock's Sales Agent supports two critical workflows:

- **Customer Delivery Promise (ATP/CTP):** This agent assesses product availability by checking open inventory levels and component requirements. When stock is insufficient, it analyzes incoming supply to help sales teams make reliable delivery commitments — giving customers an accurate picture of when their orders can be fulfilled.
- **Lot Trace & Recall:** This agent tracks items by lot number. If items from a defective or damaged lot have been shipped, it identifies affected orders and generates a recall or action list for the

impacted customers.

Rootstock's Purchasing Agent helps execute the following actions:

- **Purchase Order Expediting:** The agent provides purchase order delay analysis and, when a due date slips, determines which sales orders and work orders will be impacted and identifies alternative supply sources — enabling proactive action to minimize downstream delays.
- **Lot Trace & Recall:** The same lot tracking capability applied within the purchasing context, ensuring full traceability across the supply chain.

Both agents are native to [Rootstock's ERP platform](#) and are also available inside certain workplace messaging apps, as well as through MCP (Model Context Protocol) servers. This gives customers the flexibility to access Rootstock AI capabilities through their preferred AI agent interface. Pilot customers are actively using the agents in their production environments.

"Our vision is to lead the AI-driven ERP (<https://www.rootstock.com/manufacturing-erp-software/>) market," said Ohad Idan (<https://www.linkedin.com/in/ohadidan/>), VP of Product at Rootstock Software. "To meet this goal, the agents in this release were co-created with a select group of manufacturing customers through our AI Council, ensuring we identify and solve real-world challenges with our AI initiatives. These agents are a critical step in Rootstock's AI journey, and we are already seeing them make a real difference — surfacing reliable information at the right moment so our customers can move faster and with greater confidence."

The Rootstock Summer '26 Release also includes these enhancements:

- **AccessGuard: Enterprise-Grade Security Built for Midmarket Manufacturers and Distributors.** Midmarket manufacturers and distributors have long faced a difficult tradeoff — enterprise-level security tools designed for large, complex organizations are often out of reach in terms of cost and implementation burden, leaving growing companies underprotected. AccessGuard changes that. Rootstock's first native enterprise security solution delivers company-level and division-level access controls, ensuring users see only the records they're authorized to access — cleanly segmented by company and division and embedded directly into Rootstock ERP, with no additional platform complexity required. AccessGuard is available as an add-on to Rootstock ERP.
- **RootForms Word Export: Delivering on Customer-Driven Innovation.** Rootstock is committed to customer-driven development through its Idea Factory. The Summer '26 Release delivers Word format export for RootForms — an Idea Factory submission that was highly supported and voted on by users. Customers can now export RootForms documents to Word (.docx) format in addition to the existing PDF option, giving teams greater flexibility in how they distribute and collaborate with ERP-generated documents.

- **Advancements in Rootstock Financials.** Rootstock has been systematically strengthening its financial capabilities to meet the demands of organizations operating in complex, global environments. The Summer '26 Release contributes to this momentum with significant enhancements designed to increase the productivity of financial users — including a completely reimagined Bank Statement Workbench and reconciliation experience with embedded bank connectivity, enhanced auto-reconciliation processing, expanded support for European and Canadian operations, and deeper integration with third-party accounting platforms. These updates mark Rootstock's ongoing commitment to building a robust financial platform that also delivers a refined user experience.

“By adding enterprise-grade security, advancing our financial capabilities and continuing to respond to customer-supported ideas, Rootstock’s ERP platform is becoming more powerful for the manufacturers and distributors we serve,” added Idan.

To learn how Rootstock helps product companies modernize operations and scale with confidence, schedule a demo today: <https://www.rootstock.com/erp-software-demo/>.

ABOUT ROOTSTOCK

Rootstock Software (<https://www.rootstock.com/>) provides the leading ERP for product companies (<https://clouderp.rootstock.com/tec-insight-report-erp-for-smb>), empowering manufacturers, wholesalers, and distributors to turbocharge their operations. 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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