

integraERP Suite 3.6

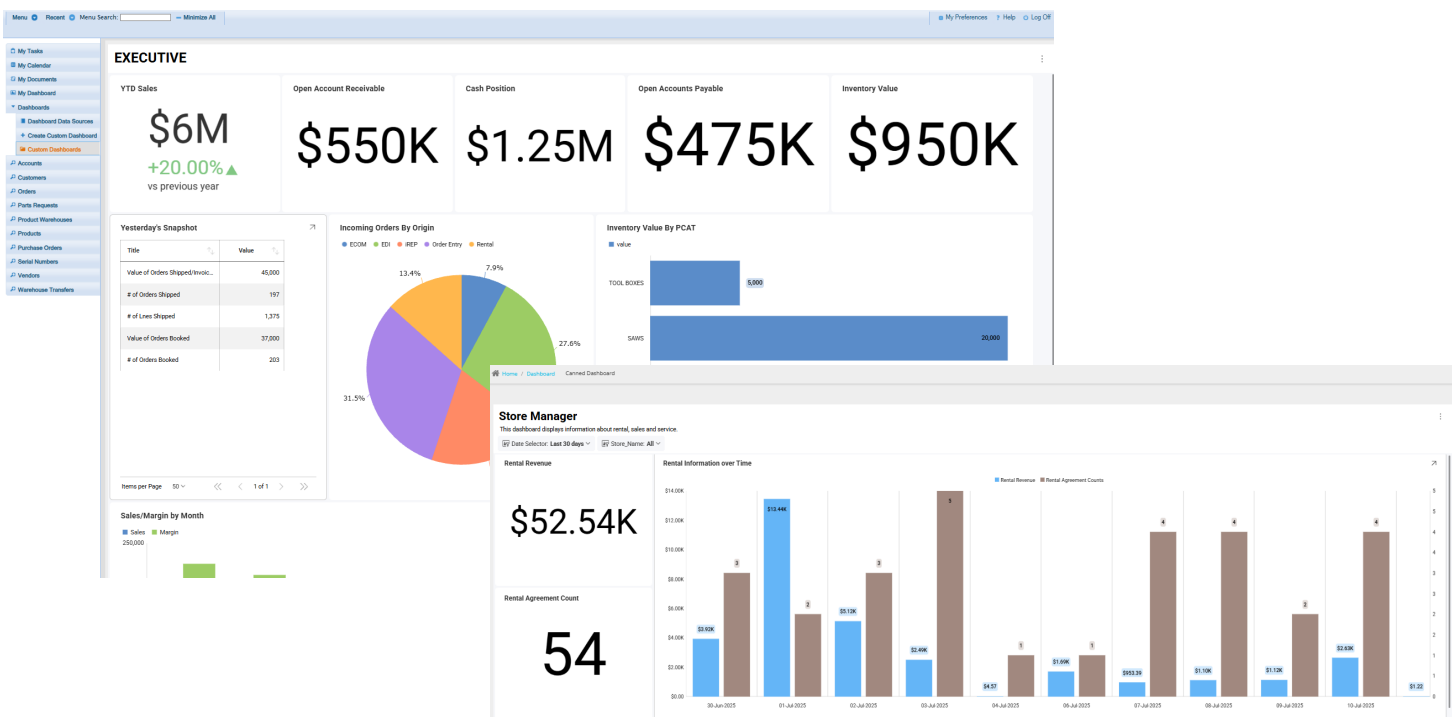
Enhanced Business Management Solutions

Updates beginning August 18th, 2025

Visualize your data with integraBI, spend less time reconciling statements, explore improved look and feel for ecommerce sites, utilize expanded data fields, handle larger orders, and save costs on packaging.

Brand New to integraERP 3.6

Introducing integraBI: Actionable Business Intelligence – integraBI brings powerful reporting and data visualization tools directly into your integraERP software. Designed to empower a business’s decision-makers, integraBI is a new, embedded solution that delivers real-time dashboards, trend analyses, and customizable reports, with no need for external tools.

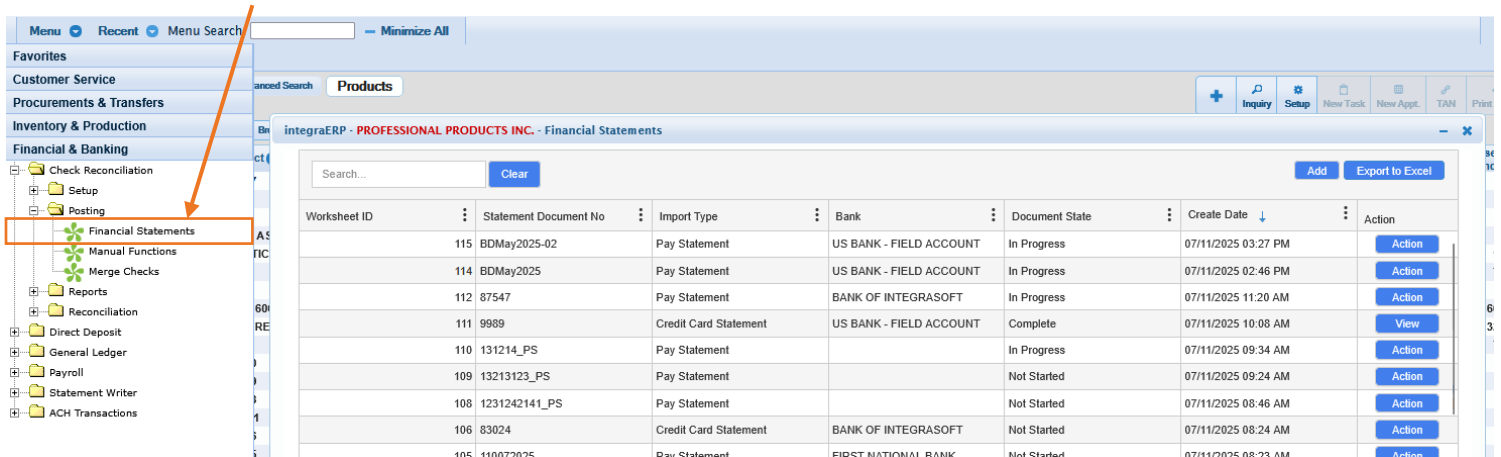


integraBI is an add-on premium solution pack for your annual integraERP Subscription that comes in two offerings: Baseline & Custom. "Baseline Dashboards" include a limited, basic set of dashboards by role (see below list). The baseline dashboard list will grow over time with future releases. "Custom Dashboards" allow you to create and share dashboards unique to your organization. It also includes up to 10 hours of services that can be used for consulting, training, and support assistance related to custom dashboards. Users can be assigned permissions to specific dashboards. Contact your integraSoft account manager to learn more about integraBI.

- Purchasing
- Inventory Management
- Sales Rep
- Accounts Receivable Rep
- Accounts Payable Rep
- ECOM Selling Site
- Executive Dashboard
- WMS

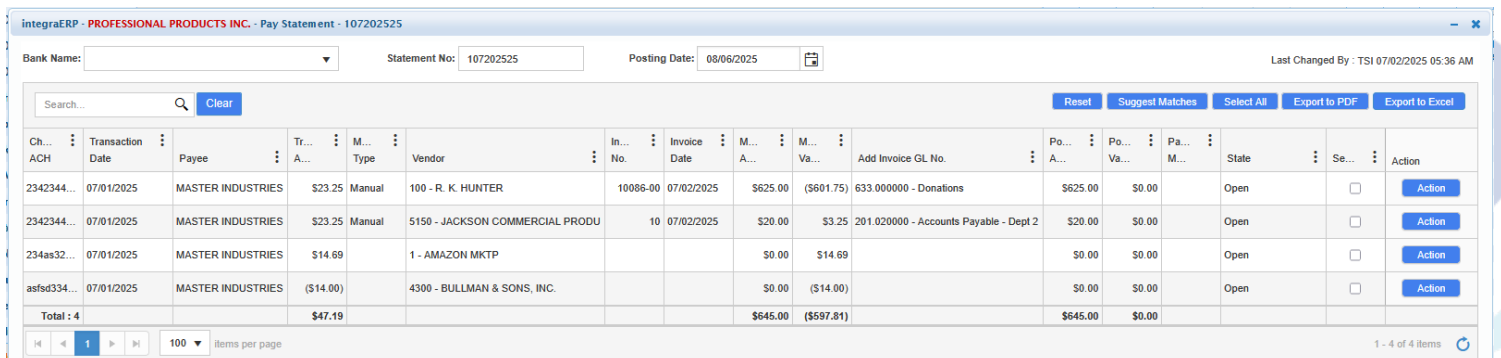
Dramatically Reduce Time to Reconcile Statements!! – integraERP 3.06, takes the heavy lifting out of financial statement reconciliation by reducing manual entry. The new Check Reconciliation of Financial Statements feature allows users to import and process credit card, bank, and pay statements directly inside ERP, removing the need to type in transactions one by one or dig through paper receipts. Whether it's a large batch of credit card purchases, a monthly bank statement, or vendor payments to reconcile, this new features makes it easy to import, match, and post with just a few clicks. Best of all, it remembers how transactions were handled last time, making future reconciliations even faster.

The **Financial Statement screen** is where reconciliation begins. Users import a file from their bank, credit card provider, or internal ledger using a simple wizard. The data appears in a clean, spreadsheet-style layout. Here, users can review, sort, and filter transactions. If the statement has been used before, the system applies a saved template- no need to remap columns or reformat files. Each statement can be saved as a "working file," giving the user time to review or adjust entries before final posting.



Main Financial Statement Screen

The **Pay Statement screen** focuses on matching incoming pay statements to transactions already recorded in Accounts Payable. If a match is found, it's displayed with a side-by-side comparison of values for quick verification. If not, users can choose to post a new transaction or take alternate action. This section also allows for catching discrepancies early, ensuring that outgoing payments align with what's been recorded and paid through the bank.



Pay Statement Screen

The **Bank Statement view** simplifies matching deposits, withdrawals, fees, and other activity directly against integraERP's records. It shows where items match up, where there are differences, and where something new needs to be posted. Common transactions like service fees or interest can be posted to the General Ledger directly from this screen, reducing time spent bouncing between modules. If a transaction was handled a certain way before, the system suggests the same treatment again, saving time with every future import.

integraERP - PROFESSIONAL PRODUCTS INC. - WorkSheet Detail - Bank Statement - 54321

Bank Name: Clearing Date: 07/02/2025 Last Changed By: TSI 07/30/2025 12:22 PM

Search... Clear Show Bank Summary Reset Suggest Matches Export to Excel

Transaction No	Transaction Date	Memo	Transaction Type	Transaction Amount	Match Type	Check/Deposit No	Type	Date	Amount	Variance Amount	State	Action
1	07/01/2025	Food	Check	\$5.00	Amount	7706	AP	2025-07-16	\$5.00	\$0.00	Open	Action
2	07/01/2025	Refund	Deposit	\$12.30						\$12.30	Open	Action
3	07/01/2025	Gas	BankTransfer	\$45.32						\$45.32	Open	Action
4	07/01/2025	Jon	BankFee	\$15.99						\$15.99	Open	Action
5	07/01/2025	Nathan	Deposit	\$20.00	Amount	6182501	DP	2025-06-18	\$20.00	\$0.00	Open	Action
6	07/01/2025	Mason	BankTransfer	\$125.27						\$125.27	Open	Action
7	07/01/2025	Nate	Check	\$150.00						\$150.00	Open	Action
8	07/01/2025	Shri	Check	\$224.67						\$224.67	Open	Action
9	07/01/2025	Shankar	BankTransfer	\$98.55						\$98.55	Open	Action
Total : 9				\$697.10					\$25.00	\$672.10		

100 items per page 1 - 9 of 9 items

Bank Statement Screen

The **Credit Card Statement screen** helps users reconcile credit card purchases and payments by presenting the statement data alongside internal ERP records. Transactions can be matched to previously entered expenses or posted in groups to the correct accounts. Whether it's a one-time vendor purchase or a recurring monthly charge, users can assign and confirm transactions in just a few steps. Like the other views, the system learns how recurring items are typically handled, helping speed up future reconciliations with smart suggestions.

integraERP - PROFESSIONAL PRODUCTS INC. - Credit Card Statement - 8996

Bank Name: FIRST NATIONAL BANK CC Statement: 8996 Vendor: 25 CREDIT CARD VENDOR Posting Date: 07/04/2025 Last Changed By: TSI 07/02/2025 08:07 AM

Search... Clear Reset Suggest Matches Export to Excel

Transa...	Transa...	Description	Trans...	Match ...	Category	Reference	Docum...	Category GL / GL History	Type	Date	Amount	Varia...	Action
07/04/2025		RIVERSIDE BAR & GRILL	\$53.88	Manual	Dining			632.000000 - Dining	GL	2025-07-04	\$53.88	\$0.00	Action
07/04/2025		WM SUPERCENTER #4511	\$29.01	Manual	Supplies			130.000000 - Inventory	GL	2025-07-04	\$29.01	\$0.00	Action
07/04/2025		Amazon.com	(\$25.99)		Other Services			623.000000 - Dealer Meetings	GL	2025-07-04	(\$25.99)	\$0.00	Action
07/04/2025		AMAZON MKTPL'NW0X747L1	\$198.09		Other Services			623.000000 - Dealer Meetings	GL	2025-07-04	\$198.09	\$0.00	Action
07/04/2025		TST'PALMER GRILL	\$57.08	Manual	Gas/Automotive		0	120.000000	Multiple	Multiple	\$57.08	\$0.00	Action
07/04/2025		Twilio R23TBF2SC4M3B769	\$10.01		Internet			550.000000 - Cost of Sales Line Five	GL	2025-07-04	\$10.01	\$0.00	Action
07/04/2025		ADOBE *ADOBE	\$63.59	Manual	Internet			550.000000 - Cost of Sales Line Five	GL	2025-07-04	\$63.59	\$0.00	Action
07/04/2025		AMAZON PRIME'NW1RD4781	\$16.04		Internet			550.000000 - Cost of Sales Line Five	GL	2025-07-04	\$16.04	\$0.00	Action
07/04/2025		Twilio JRCJMM475ET61 7D35	\$10.08		Merchandise			510.000000 - COSTS FOR DEPARTMENT 00	GL	2025-07-04	\$10.08	\$0.00	Action

Credit Card Statement Screen

Improved Tracking for Bank GL Transactions in Check Reconciliation – Check Reconciliation in integraERP 3.6 now automatically creates a record whenever a transaction posts to a bank-linked GL account. A new optional field in Bank Setup allows banks to be tied to specific GL numbers, with safeguards to prevent overlap. These updates apply across several posting areas, including manual entries, imports, recurring transactions, and voided checks. integraERP 3.6 also features new behind-the-scenes tracking utilities that store journal and check numbers, improving clarity and audit tracking.

integraERP - PROFESSIONAL PRODUCTS INC. - Check Reconciliation-Setup-Banks

Maintain Mode

Bank Number: 1

Bank Name: BANK ONE

Address 1: 2547 TECH DRIVE

Address 2:

City: BETTENDORF

State/Province: IA

Zip Code: 52722

Country: US

ID Number: 1389987

Last Changed Date: 071805

Bank Balance: 10225.33

Book Balance: 10225.33

Bank GL Account: 1003.000000

Next GL Check Number: 6542

? Help X Cancel ✓ Save/Update

Expanded Reference and Invoice Fields – integraERP 3.6 has increased the character limit for key reference fields, supporting longer and more detailed entries. The Purchase Order Invoice Number and Reference fields, as well as the Order Master Reference field, have all been increased to 30 characters across relevant screens, documents, reports, and inquiries. This update improves flexibility in naming conventions and external references, ensuring consistency and clarity throughout your accounting system.

integraERP - PROFESSIONAL PRODUCTS INC. - Purchase Orders-Posting-Costing - PO 13380-00, - Vendor:1001 -- MULTIPLE PART VENDING

Maintain Mode

Header Line Items

PO Number: 13380-00

Invoice Number: 001554YEL-92001234567890123456

Invoice Date: 063025

Due Date: 063025

Cash Discount: 3.00 %

Pay Type:

Memo: PLEASE REF 13380-00

Department Number:

Do Not Update Replacement Cost:

Type: PO

Vendor Number: 1001 -- MULTIPLE PART VENDING

Terms: TERMS 1

Days: 0

Freight On Board:

Reference: PLEASE REFERENCE THE ONLY INV.

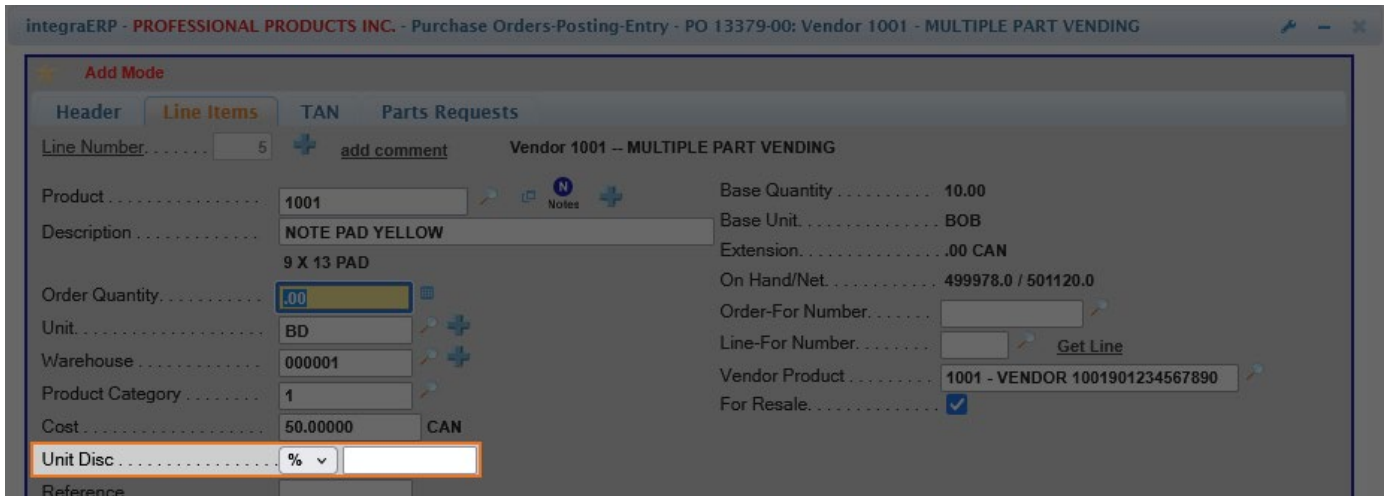
Ship Via: UPS

Order-For Number:

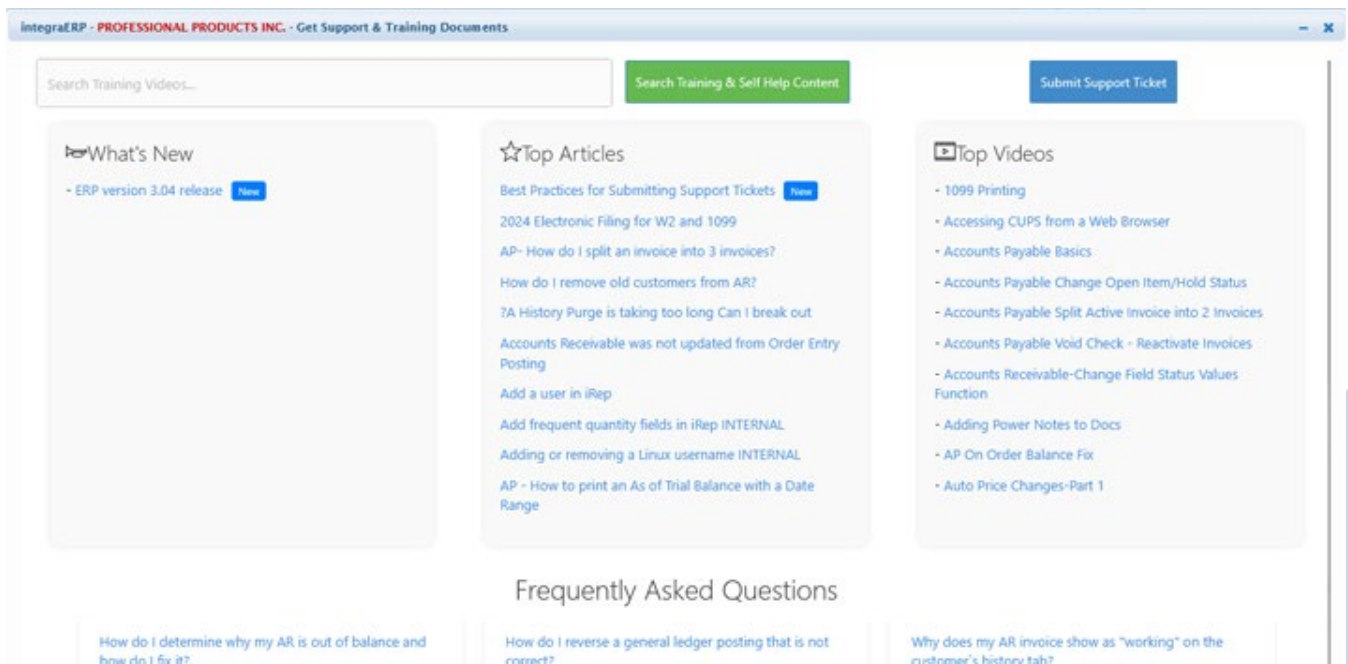
999 Million Dollar Orders! – ERP 3.6 has expanded the supported size for pricing, discount, and commission fields. This update allows for high-value transactions - up to \$999 million with precise decimal support – providing greater flexibility when working with large orders, complex pricing structures, or bulk discounts, and increasing integraERP’s ability to scale with your business growth.

Display Supersede Information on Product Records – Product records now show when an item has been superseded and will display the replacement item, if one exists. This enhancement to integraERP makes it easier to identify and work with products that have a Supersede Cross Reference set up, helping streamline inventory management and reduce ordering errors.

Purchase Order Line Discounts Now Supported – Line-item discounts can now be entered directly within Purchase Order Entry, allowing for more detailed and accurate cost entry. Users can apply a unit discount or enter a percentage, which is automatically converted to a dollar amount. integraERP will calculate the net cost per item and update line and order totals accordingly. To enable this system setting after upgrading to integraERP 3.6, contact integraSoft support.

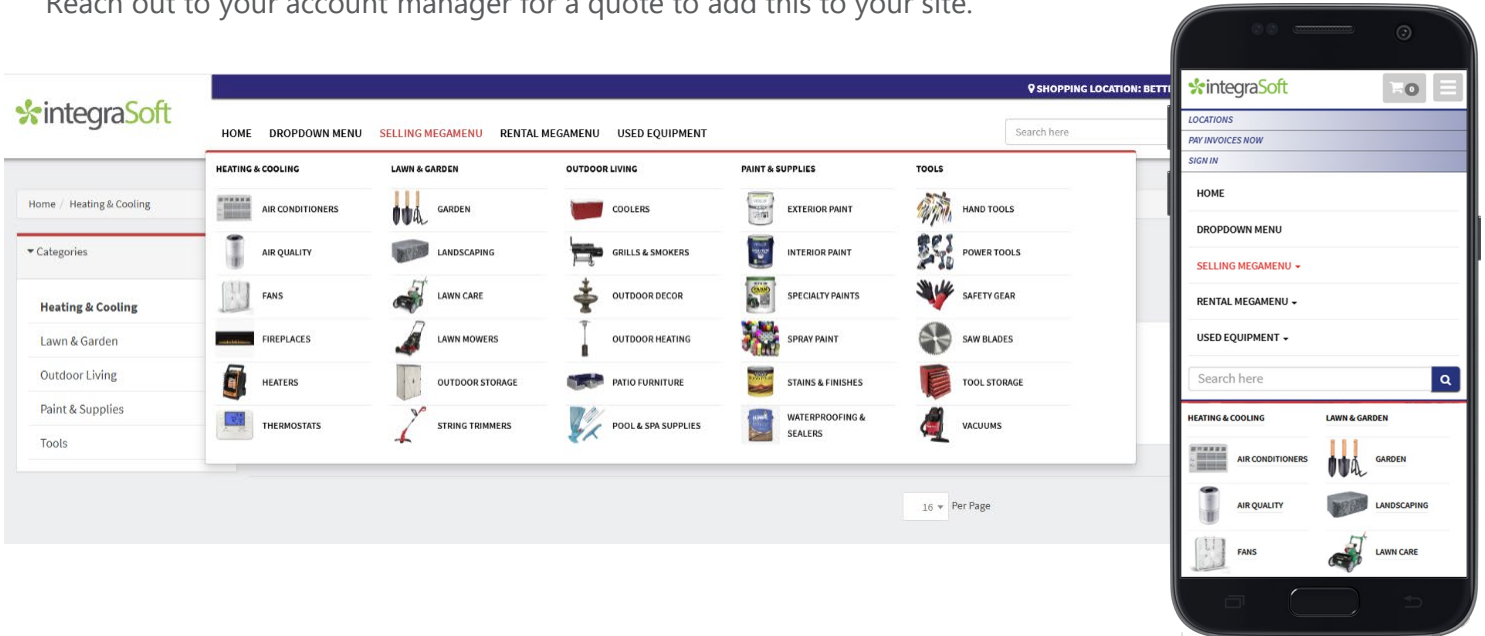


Self-Help Resources within ERP – ERP users can easily access our growing library of product documentation, complete with explanations of ERP features, step-by-step tutorials, and answers to frequently asked questions to augment and improve the ERP experience.

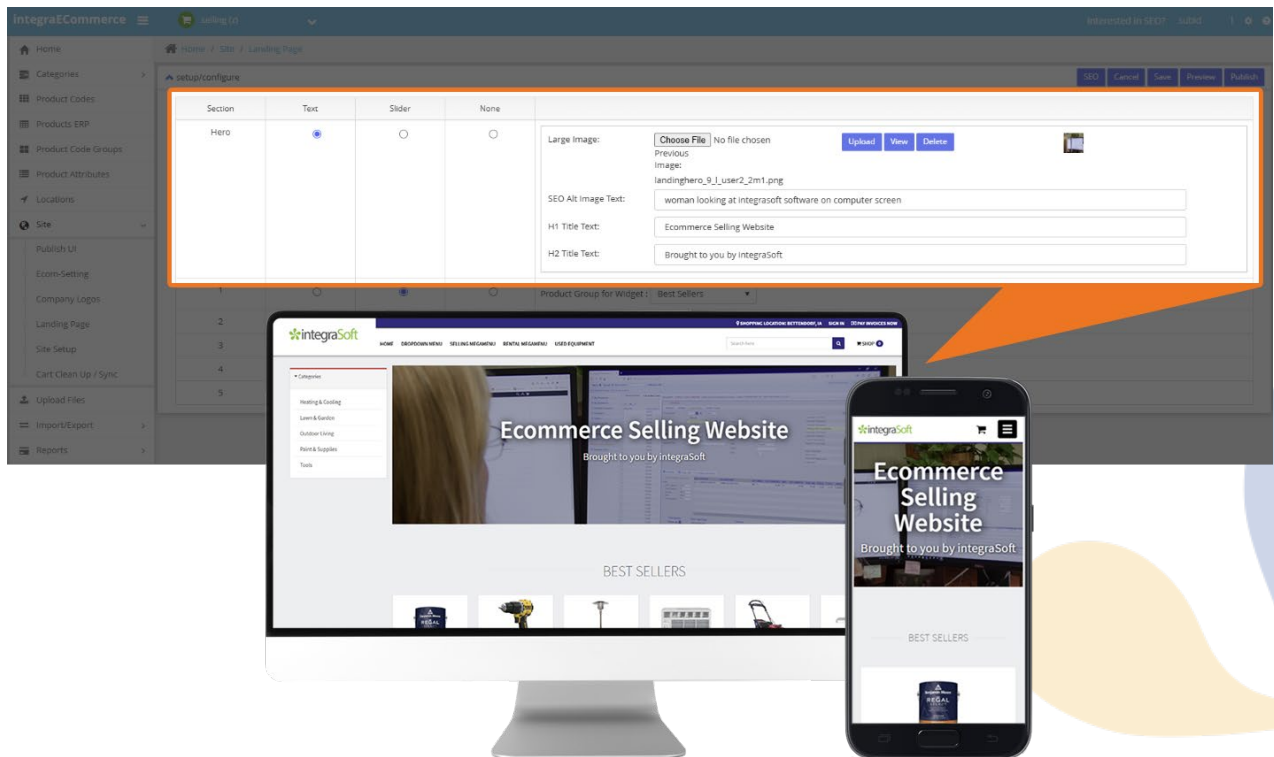


New eCommerce Features

Mega Menu Category Navigation – In the header of your ecommerce site, display your base and first nested layer of subcategories in a visually appealing dynamic mega menu. When categories are added/modified/deleted, the mega menu automatically updates. Designed for both desktop and mobile. Reach out to your account manager for a quote to add this to your site.

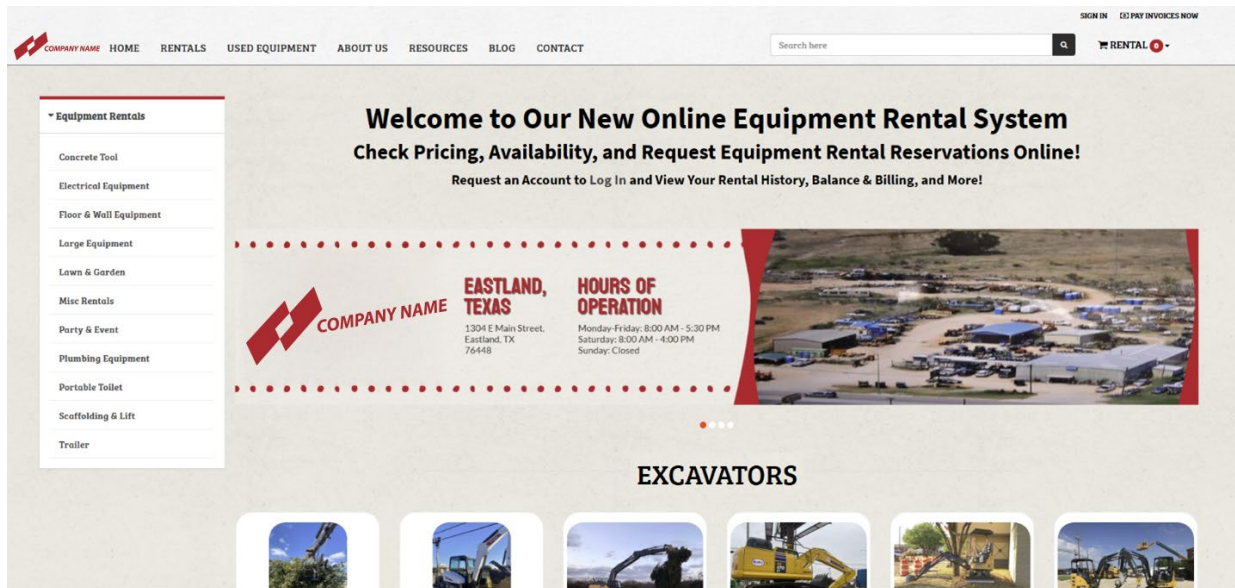
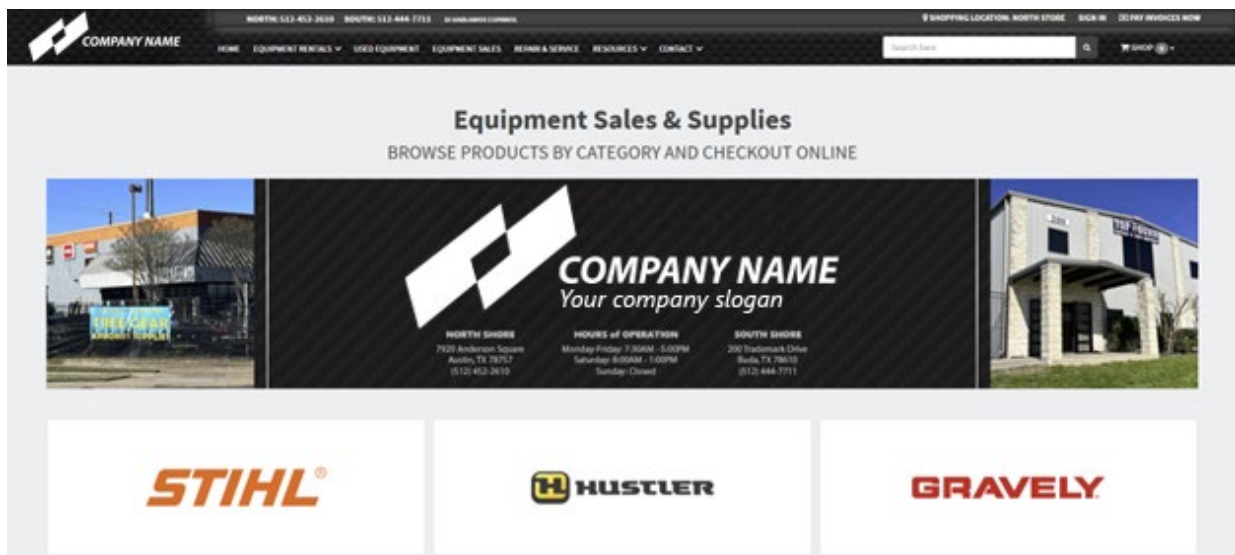


Landing Page Hero Image – The landing page of the ecommerce sites can now be configured to allow for images to be uploaded as Hero Images including alt text, H1, and H2 title texts. This lessens the need for knowledge of HTML/CSS coding to create a great looking landing page and allows you to show custom messaging that is automatically formatted with a responsive design for any screen size.

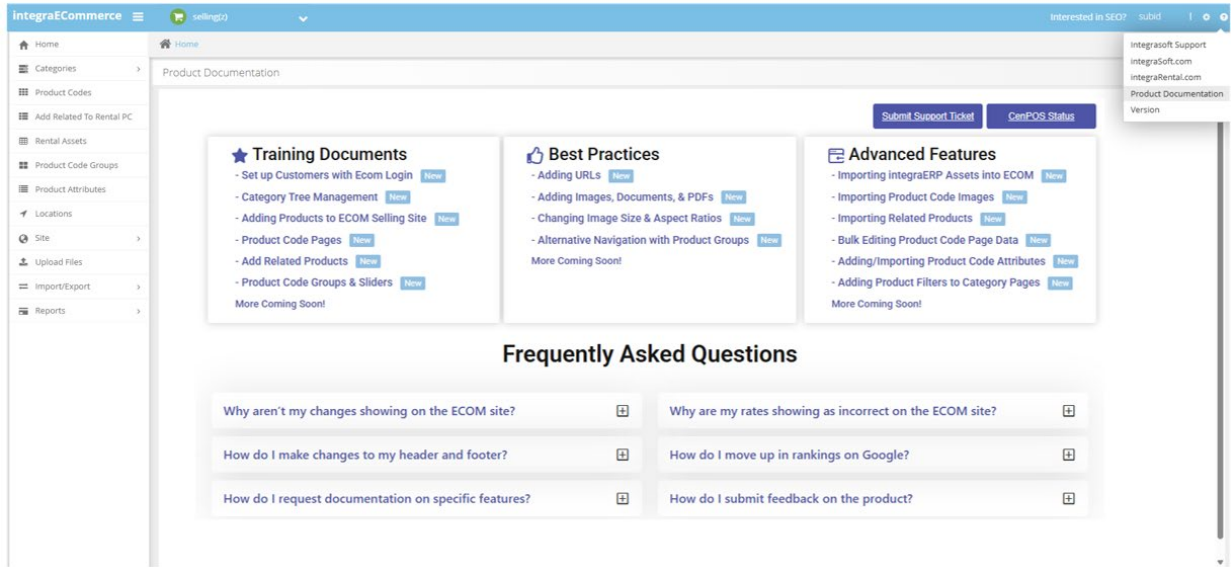


Improved Design Templates and Navigation – We’ve updated our design templates for the overall look and feel of the site with a major focus on color scheme throughout the site on popups, buttons, header, footer, and more. Below, are a few examples of our templates and modern design with customizations for each business’ color scheme and branding. Updating/customizing the new templates, header, and footer is considered billable work and is custom quoted based on your needs.

On mobile, category navigation, groups, and attributes can now be configured to display at the bottom of the page, directly above the footer, for a better user experience for customers browsing your ecommerce site.

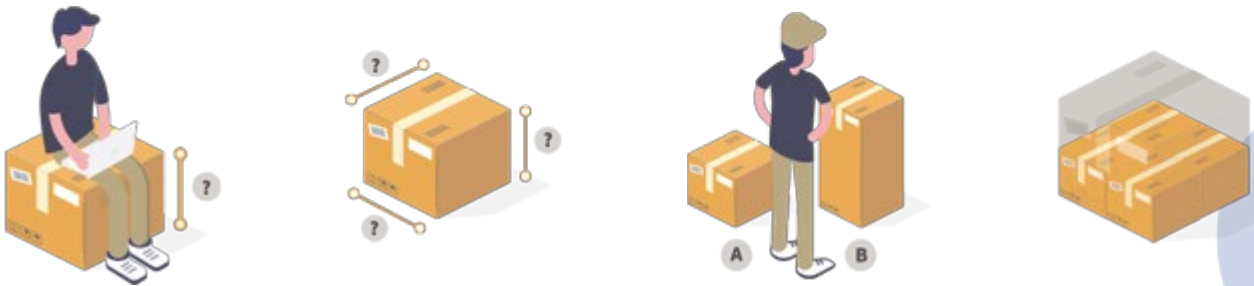


Self-Help Product Documentation within iNextAdmin – ECOM Admin users can easily access our growing library of product documentation complete with explanations of ecommerce features, step-by-step picture tutorials, and answers to frequently asked questions to augment and improve the ecommerce website.



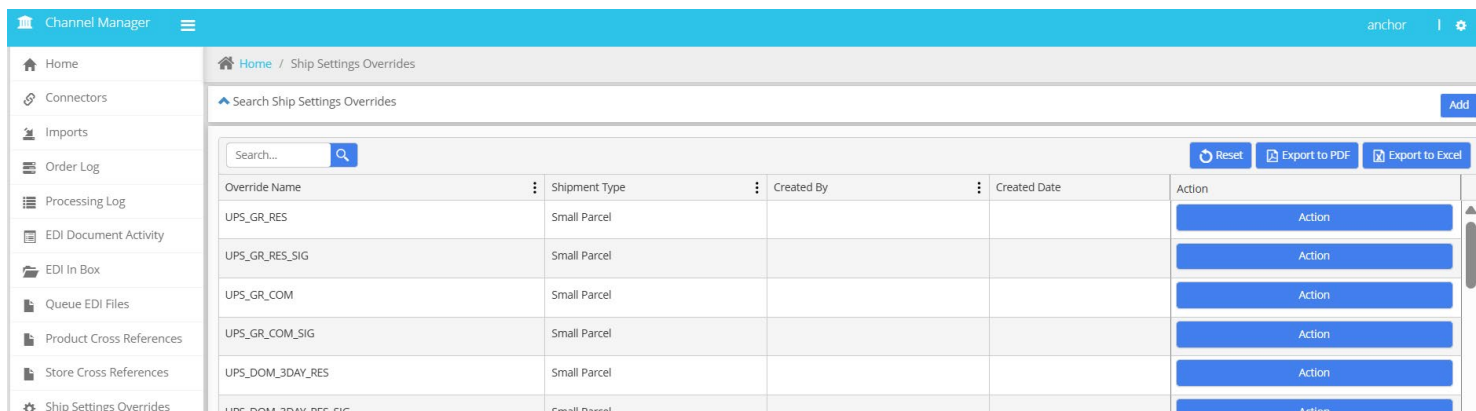
New WMS Features

Announcing the New 3DBinPacking Integration – integraWMS is proud to announce a new integration with 3DBinPacking, empowering you to pick the right boxes and saving big money. With this integration, sold separately, integraWMS will automatically determine the most space-efficient way to pack items into boxes, bins, or pallets, helping to reduce shipping costs, minimizing packaging waste, and saving time.



This feature also includes the “Find a Box Size” tool which recommends the right-sized container for packing. integraWMS integrating with 3DBinPacking makes it easier than ever to pack and ship with speed and accuracy, while reducing costs and improving your bottom line.

Ship Settings Override Management – Ship Settings Override, a feature of eChannelManager that allows the incoming data to dictate what ship settings to use, we’ve now introduced the ability to add and edit ship setting overrides in the eChannelManager application. Users can search, add, edit, and copy ship settings, including third-party account details, to support mapping ship settings to input from incoming order transactions.

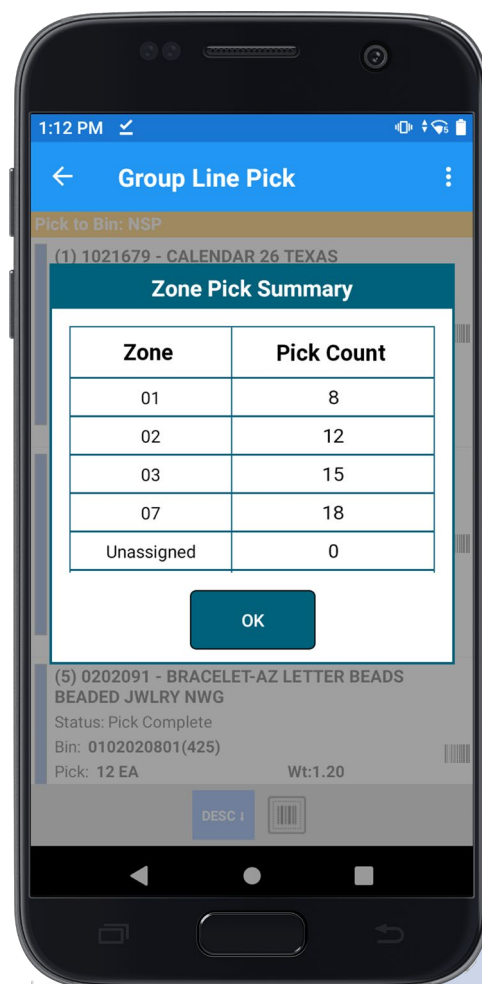


Zone Pick Summary for Resource Planning – A new Zone Pick Summary feature displays expected pick counts by warehouse zone. This helps teams allocate labor and resources more effectively during peak picking periods.

See screenshot to the right for this feature in action.

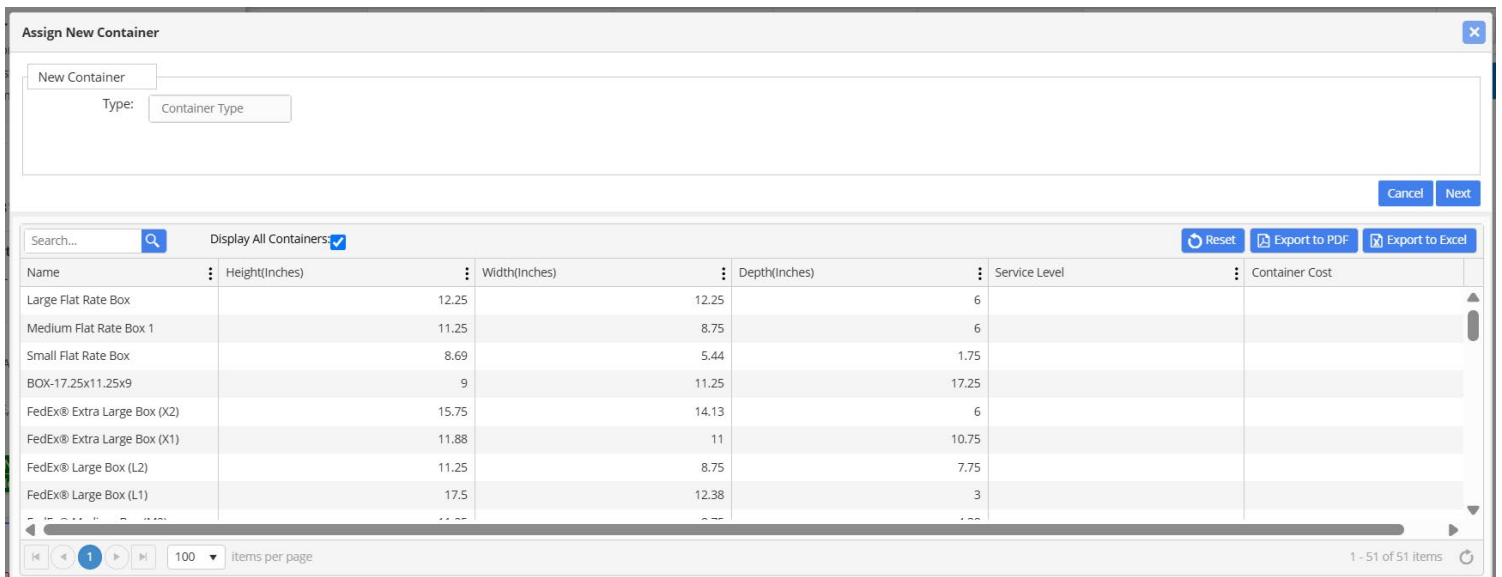
Search PO by Product – Users can now scan or enter a product number to quickly find an open purchase order. This new search feature is available in Single PO Receiving, Single PO Receive & Put Away, and Group PO Receiving, speeding up the receiving process and reducing errors when locating the correct PO.

Quick Access to Product Detail from Bin Lookup in Mobile – Users can now drill directly from a bin’s product list into product detail, reducing clicks and improving visibility when reviewing bin contents.



Zone Pick Summary for Resource Planning

Improved Container Assignment – The packing process has been streamlined with a redesigned view for assigning new containers. Users now see a simplified container list without needing to open lookup windows. The interface supports sorting, filtering, and personalized column layouts, making container selection faster and more intuitive.



Cycle Count Now Integrated with Put Away – Cycle Count Now can now be performed during all Put Away functions by long-pressing the product line when a bin is suggested. This real-time inventory verification helps maintain accuracy while reducing the need for separate counting steps. This feature has been introduced to the following areas:

- Managed Inventory Put Away
- Bin Replenishment
- PO Receive & Put Away
- Group PO Put Away
- Warehouse Transfer Picking and Receive & Put Away
- Customer Order Credit Memo Put Away

Unquarantine During Inventory Adjustments – This new setting adds flexibility to inventory adjustments by allowing bins to be unquarantined during the process. A "Quarantine" checkbox has been added to the Adjust Inventory screen, with a confirmation popup that lets users decide whether to remove the quarantine during the adjustment.

Simple Serial Number Capture in Packing Process – New serial number capture tools have been added during packing to capture serial numbers picked and shipped for customer orders. This feature improves traceability and prevents duplication. When serial numbers are required before completing shipping, they can now be captured and printed on packing slips.

Prompt for Missing Container Dimensions – When packing in the kiosk interface, users will now be prompted to enter container dimensions if they haven't been saved in the container profile. This ensures more accurate data and helps reduce errors during rate shopping.

Assign New Container

New Container

Type: Height: Width: Depth: Weight:

Height, Width, Depth and Weight are required

Set Maximum Shipment Value by Carrier Service – This new setting allows users to define a maximum order shipment dollar value for each small parcel carrier and service level. This helps prevent high-value shipments from being assigned to low-coverage services like USPS Ground Advantage. Instead, those shipments can be automatically routed to more reliable options such as Priority Mail or FedEx Ground, improving delivery protection and customer confidence.

