IDA solutions for SAP Business One and your operation

Consulting, our own products, add-ons and artificial intelligence connected to your ERP. This catalog summarizes each solution, what it includes and how far it goes.

SERVICES

SAP Business One · SAP Business One Hosting · Integrations and services

SOLUTIONS

InStock WMS · NovaFleet · NovaMaint · InSales · NovaPOS · NEXO AI · NovaDocs

ADD-ONS

Bank reconciliation · Vendor payments · Web services and integrations · Portals and dashboards · Report library · Custom development

WHO WE ARE

IDA Software Solutions

Over 14 years of experience. Expert SAP Business One consultants and developers. Mobile WMS, fleet and logistics, sales force, point of sale, ERP-connected AI and hosting. Offices in Venezuela and Miami.

Orlando has worked with SAP since 2009 and is a certified consultant in SAP ABAP, SAP BW and SAP Business One, experience he combines with software architecture. In 2012 he co-founded IDA Software Solutions, where he leads product design together with the team of consultants and developers. Today he brings that experience to artificial intelligence: he designs how AI connects to the ERP in a governed, auditable way, the foundation of NEXO AI and NovaDocs.

SERVICES

- **SAP Business One**
  Consulting, implementation and development
- **SAP Business One Hosting**
  Enterprise hosting
- **Integrations and services**
  Implementation and guidance

SOLUTIONS

- **InStock WMS**
  Mobile warehouse management
- **NovaFleet**
  Fleet, logistics and maintenance
- **NovaMaint**
  Equipment and asset maintenance (CMMS)
- **InSales**
  Sales force and B2B portal
- **NovaPOS**
  Point of sale
- **NEXO AI**
  Artificial intelligence connected to the ERP
- **NovaDocs**
  AI-powered intelligent document processing

ADD-ONS

- **Bank reconciliation**
  Speeds up reconciling your bank accounts against SAP Business One and cuts manual work at closing.
- **Vendor payments**
  Prepare, control and post vendor payments in SAP Business One with order and traceability.
- **Web services and integrations**
  Web services to connect your ERP with other systems, portals, apps and business partners.
- **Portals and dashboards**
  Web portals and KPI dashboards so every team sees the information it needs.
- **Report library**
  Many ready-built reports, ready to use and adaptable to your operation.
- **Custom development**
  Need something different? We design and build it on top of your ERP.

SERVICES

SAP Business One

Consulting, implementation and development

Functional and technical consultants who guide your company through SAP Business One: from process analysis and go-live to custom development, integrations and ongoing support.

- Functional and technical consulting
- Implementation and go-live
- Custom development and integrations
- Support and continuous improvement

See it online: idasoftware.com/en/sap-business-one →

SCOPE

What we do

Functional consulting

Experts in finance, inventory, purchasing, sales and production who turn your processes into SAP Business One configuration.

Implementation and go-live

Assessment, configuration, integration, testing, training and support, adapted to the scope of each project.

Custom development

Senior developers in DI API, Service Layer, HANA, SQL Server, mobile and web apps for what the standard does not cover.

Support and continuous improvement

Guidance after go-live, with a support portal to follow up on every case.

Ready-made add-ons for SAP Business One

Beyond our products, we extend the ERP with ready-built add-ons and reports.

Bank reconciliation

Speeds up reconciling your bank accounts and cuts manual work at closing.

Vendor payments

Prepare, control and post vendor payments with order and traceability.

Report library

Many ready-built reports, ready to use and adaptable to your operation.

SERVICES

SAP Business One Hosting

Enterprise hosting

IDA hosting service, with experience since 2016, for SAP Business One and its complementary applications. Each project defines sizing, support, backups and operational responsibilities.

Experience since 2016 | Tailored sizing | Support and backups per project

See it online: idasoftware.com/en/sap-business-one-hosting →

SCOPE

What it includes

SAP Business One and its applications

We host the ERP together with the complementary applications of your operation, such as our products and add-ons.

Tailored sizing

We define resources based on the users, modules and volume of your company.

Support and backups

Support, backups and operational responsibilities are agreed for each project.

Specialized team

Infrastructure architects with experience operating SAP Business One since 2016.

SERVICES

Integrations and services

Implementation and guidance

We connect your ERP with other systems, portals, applications and business partners, so information flows without double entry and always lands in SAP Business One.

Assessment and integration | Training and support | Coordinated work with the channel

See it online: idasoftware.com/en/sap-business-one-integrations →

SCOPE

What we integrate

Web services

Web services to connect SAP Business One with other systems, applications and business partners.

Portals and dashboards

Web portals and KPI dashboards so every team sees the information it needs.

Report library

Many ready-built reports, ready to use and adaptable to your operation.

Custom development

Need something different? We design and build it on top of your ERP.

AI integrations

AI connected to the ERP

NEXO AI connects Claude, ChatGPT and other MCP-compatible assistants to your SAP Business One data, with permissions and auditing.

Documents that enter on their own

NovaDocs receives invoices and orders by email, folder or WhatsApp and posts them to SAP Business One.

Fleet and maintenance

NovaFleet and NovaMaint provide a REST API and webhooks to connect with your ERP.

SOLUTIONS

InStock WMS

Mobile warehouse management

InStock brings SAP Business One warehouse and dispatch operations to the floor: picking, packing, deliveries, receipts, transfers and counts with barcodes, batches, serial numbers and bins. No re-typing, no paper and no waiting to "enter" the order.

- Picking, receipts, deliveries, transfers and counts
- Batch, serial number and bin location control
- HANA and SQL Server support

See it online: idasoftware.com/en/instock-wms →

SCOPE

The full warehouse cycle, in one app

Each module creates or closes the real SAP Business One document through the DI API, with the same validations as the SAP client.

Picking and Pick List

Guided by item and bin, validates quantities line by line and controls serials and batches.

Deliveries and invoicing

Delivery or delivery + invoice on confirmation, with customer signature, evidence photo and packages.

Goods receipt

Against purchase orders or free, with batch, expiry, serial and bin in the same step.

Transfers

Between warehouses, branches and bins, with two-step transfers through a transit warehouse.

Inventory counts

Blind counts by bin or item with direct posting of the count document in SAP.

Labels and pallets

Print item, batch and pallet labels from the phone, with traceable contents.

Route planner

Touch board to build delivery routes by dragging orders and assigning them to drivers.

Fuel dispatch

Balance per customer and currency, FIFO dispatch per pump and printable receipt.

Dashboard and audit

Today's documents, pending items per operator, images and signatures per document.

What sets it apart

- ✓ Native SAP Business One: the document you create is the SAP document, with its validations, numbering and accounting.
- ✓ Works with any phone or PDA with a browser; no mandatory industrial terminals.
- ✓ HANA or SQL Server, cloud or on-premise, with InStock Connector as a secure bridge to the DI API.
- ✓ Built for poor signal: duplicate protection and photo compression before upload.
- ✓ Adapts without coding: extra fields, mandatory photo, printing, pallets and language by configuration.

SOLUTIONS

NovaFleet

Fleet, logistics and maintenance

NovaFleet plans the day, runs trips with live tracking for your customer, maintains vehicles and equipment and controls every cost. Connected end to end to SAP Business One, with artificial intelligence that works for your operation. Multi-company, multi-branch and multi-country.

- Planner, dispatches and Uber-style public tracking
- End-to-end SAP B1: order, picking, delivery and invoice
- Driver portal with no app and offline mode
- Includes NovaMaint with AI predictive maintenance

See it online: idasoftware.com/en/novafleet →

SCOPE

Logistics operations

From the order to the customer signature, without leaving the system.

Day planner — Differentiator

Assigns dispatches to vehicles by zone, capacity (kg and m³), customer time window and driver shift, with overload warnings, drag and drop and one-click trips.

Public tracking — Differentiator

Each dispatch creates a link the customer opens with nothing to install: live map, ETA learned from past trips, signature and photo. Email notices and shareable on WhatsApp.

Picking and load report

Picking list per trip, package scanning and checks against vehicle capacity: what was not loaded is never marked as delivered.

Delivery, redelivery and returns

Signature, photo and quantities per package. If the customer is absent or refuses, the attempt is logged with its reason and rescheduled with no rekeying.

Rates and freight settlement

For carriers and 3PLs: rates by customer, zone, weight or trip, automatic settlement and an invoice in the ERP.

Transport document by country

Internal PDF waybill, a link to the waybill your ERP already issues or, in Mexico, Carta Porte CFDI 4.0 (complement 3.1) stamped through a PAC.

Driver portal

The whole workday on the phone, with or without signal.

No app to install

Opens in the browser and installs as an app on Android or iPhone, with no app store updates to wait for.

Works offline — Differentiator

Deliveries, inspections and expenses are saved on the phone and sync automatically when the signal returns.

Push notifications

New trips, route changes or urgent alerts reach the phone even when the app is closed.

Live GPS
Position sent during the trip, with an estimate based on route progress when GPS is unavailable.

Pre-trip inspection
Point-by-point checklist with photos; critical defects take the unit out of service.

Expenses by photo AI
The driver photographs the fuel or toll ticket and AI fills in the form.

Fleet and assets

360° vehicle profile
Tires, components, maintenance, fuel, costs, insurance, documents, fines and health in a single profile.

Tire lifecycle
Tire warehouse, mounting by position, removal, retreading, disposal, accumulated km and cost per km for each tire.

Drivers
Licenses with expiry dates, violations, shifts and capacity, assigned vehicle and trip history.

Assets and plant tree
Forklifts, generators and production lines with unlimited meters, in a plant, line, equipment and component hierarchy with rolled-up costs.

Control tower
Live map with the day's trips and alerts, units that are free, en route or in the shop, and geofences and zones drawn on the map.

Insurance, documents and fines
Policies and expiry dates with a traffic light, violations by unit and driver, and accidents with their cost and corrective order.

Maintenance (CMMS)

A complete CMMS that is also sold on its own as NovaMaint.

Preventive that runs itself
Plans on several meters at once (10,000 km, 250 hours or 90 days, whichever comes first), fleet-wide campaigns and reusable templates.

Work orders
Kanban, checklist, labor hours, parts reserved from inventory, external shops, approval by amount and warranties.

Requests from drivers
Defect reports with photos from the portal; the supervisor approves in one click and the order is created.

Inspections by asset type
Checklists for trucks, forklifts and generators, with the 33-point FMCSA standard included for vehicles.

AI predictive maintenance AI
A 0 to 100 risk score per unit, with system, horizon, recommendation and estimated cost, based on each unit's real evidence.

World-class KPIs
Preventive compliance, MTTR, availability, repeat failures by system and a timeline with an AI-generated summary.

Finance and control

What each unit costs to run and what it earns.

Fuel by photo AI
AI reads liters, amount and station from the ticket, and the odometer from the dashboard; km/L per unit to spot deviations and losses.

Own fuel tank
One tank per branch with supplier receipts, an issue for every refuel, average cost and low-level alerts. With SAP, it mirrors the warehouse.

Fleet cards
Imports the issuer's statement (CSV or XLSX) and reconciles it against driver refuels, flagging differences and duplicates.

Costs by photo AI

Merchant, date, amount and taxes from each invoice in seconds; maintenance, fuel, tolls and per diems in one consolidated view.

Profitability per unit

Revenue versus cost by vehicle and project to decide which unit to renew, sell or reassign.

Scheduled reports

Monthly management summary, costs by branch or preventive compliance emailed on the date you choose, and export from every table.

Artificial intelligence

AI that knows your operation and respects your permissions.

Operations assistant AI

"Which licenses expire in 30 days?" or "Open a work order for unit 14": it answers with real data and proposes actions that only run when you confirm.

Sees only what the user can see

Assistant tools are filtered by role and by licensed modules, and every action is audited with "AI Assistant" as its source.

MCP server

Connects Claude, ChatGPT, Copilot or Cursor to the fleet with your own keys, monthly limits and auditing. AI model selectable per company, with a local provider option.

How to buy it

Three entry points, one system. Any combination in between is possible: the menu and the API adjust to what you license.

Maintenance only (CMMS) NovaMaint

For shops, plants and companies with equipment to maintain: assets, plant tree, preventive, work orders, inspections, parts and AI predictive maintenance.

Fleet Operations

For those who manage vehicles and drivers without delivery operations: the whole CMMS plus tires, fuel, tank, cards, costs, insurance, documents and profitability.

Complete Platform

For distributors, carriers and 3PLs: everything above plus planner, trips, tracking, driver portal, transport document, SAP Business One, public API, AI assistant and MCP.

What sets it apart

- ✓ Multi-company and multi-branch with full data isolation and modules enabled per company.
- ✓ Roles and permissions validated on the server for every operation, with lockout and rate limiting.
- ✓ Every create, update and delete audited with its source: user, AI assistant or MCP.
- ✓ Retention per company, anonymization of people and full data export.
- ✓ Encrypted ERP and email credentials; public API with per-company keys and webhooks with retries.
- ✓ SAP integration with a retry queue and idempotency; an ERP-neutral core to connect any other system.
- ✓ Verified backups, monitoring and more than 480 automated tests on every release.
- ✓ On your server or in the cloud, with the same package.

SOLUTIONS

NovaMaint

Equipment and asset maintenance (CMMS)

NovaMaint plans, runs and measures preventive, corrective and predictive maintenance for vehicles, forklifts, generators, production lines and any equipment in your company. It is NovaFleet's CMMS: sold on its own or with the fleet, and connected to SAP Business One.

- Work orders with checklists, labor and spare parts
- Preventive plans by miles, hours or days
- AI predictive maintenance: failure risk per unit
- Plant tree and KPIs: MTTR and availability

See it online: idasoftware.com/en/novamaint →

SCOPE

Preventive maintenance

Preventive maintenance that runs itself.

Plans on several meters

Differentiator

10,000 km, 250 hours or 90 days, whichever comes first: the order is created automatically when due.

Campaigns and templates

Campaigns (recalls) for the whole fleet or by asset type, and plan templates reusable across units and companies.

Alerts and notifications

Upcoming preventives, expiring documents and incidents in a single alert center, with push and email notices.

Work orders

From the defect report to closing, with everything documented.

Kanban board

Every order by status, with a task checklist and phases with labor hours.

Parts and purchasing

Parts reserved and consumed from inventory, maintenance purchases, external shops and technicians.

Approval and warranties

Approval by amount, repair warranties and a complete log for every order.

Requests from operators

The driver or operator reports the defect with a photo; the supervisor approves in one click and the order is created.

Inspections by asset type

Custom checklists for forklifts, machinery and generators, and the 33-point FMCSA standard for vehicles. A failed critical point creates the order and changes the asset status.

AI history

AI

Timeline per asset with a summary generated by artificial intelligence.

Predictive maintenance

Know which equipment will fail before it does.

Risk per unit

AI

A 0 to 100 risk score with system and component, probability, horizon ("2 weeks", "1,500 km"), recommendation and estimated cost.

Evidence-based

Each prediction stores the signals behind it: fuel use, repeat failures, component life, meters, inspections and corrective cost.

Never switches off

It recalculates when the data changes and, if AI is unavailable, keeps working on rules.

Assets and plant

Assets with meters

Unlimited meters per asset (hours, km, cycles) with history and anti-rollback validation, from manual readings or the API.

Plant tree

Differentiator

Plant, line, equipment and component hierarchy, with maintenance costs and open orders rolled up.

360° asset profile

Components, history, documents, insurance and a health score to prioritize repairs and replacements.

KPIs and integration

World-class KPIs

Preventive compliance, MTTR, availability and repeat failures by system: brakes, engine, electrical, suspension.

Scheduled reports

Preventive compliance and costs by branch emailed on the date you choose, and export from every table.

AI assistant and MCP

AI

Ask about your equipment, orders and parts and get actions that only run when you confirm. Connect Claude, ChatGPT or Copilot through MCP.

SAP Business One

Parts issues from the warehouse, maintenance purchases and cost centers by branch and project, posted to SAP.

Public API

Any other system connects with per-company keys and webhooks with retries, with a built-in simulator to test without development.

Insurance and documents

Expiry traffic light with the file attached inside the system and early alerts for each asset.

What sets it apart

- ✓ Sold on its own or as part of NovaFleet: the menu and the API adjust to what you license.
- ✓ Maintains vehicles and everything that is not a vehicle: forklifts, generators and plant lines.
- ✓ Multi-company and multi-branch with full data isolation.
- ✓ Roles validated on the server and every change audited with its source.
- ✓ English, Spanish and Portuguese, on your server or in the cloud.
- ✓ More than 480 automated tests on every release.

SOLUTIONS

InSales

Sales force and B2B portal

InSales combines an app for your sales team with a self-service portal for your business customers. Catalog, stock, customer pricing and orders connected to SAP Business One, so every sale reaches the ERP without retyping.

App for the sales team | Portal for business customers | Digital channel with buyers

See it online: idasoftware.com/en/insales →

SCOPE

Sales force app

Everything a rep needs to close the deal in front of the customer.

Orders and quotes
Create quotes and orders in seconds, validated against stock, pricing and customer terms.

Visual catalog
Show products with photos, descriptions and real-time availability by warehouse.

Customer profile
Purchase history, open invoices, credit limit and balance before taking the order.

Routes and visits
Visit schedule per rep, visit logging and follow-up of the assigned portfolio.

Field collections
Payment recording and customer statements so every visit also collects.

Goals and performance
Sales progress by rep, territory and product for the team and sales management.

Self-service B2B portal

A digital channel where business customers buy and serve themselves.

Online ordering B2B
Customers build orders with their own price list, discounts and negotiated terms.

Quick reorder
Repeat previous orders or frequent products in a couple of clicks.

Invoices and statements
Check invoices, payments and balances without calling or emailing your team.

Order tracking
Status of every order from reception to dispatch.

Users per company
Multiple buyers per customer, each with their own permissions.

Your brand
A portal with your company branding to strengthen customer relationships.

What sets it apart

- ✓ Built for SAP Business One: customers, items, price lists and orders flow to and from the ERP.
- ✓ One catalog, stock and pricing for the app, the portal and the point of sale with NovaPOS.
- ✓ Less data entry at the office: the order is entered once, where it happens.
- ✓ Commercial visibility for management: sales, visits and receivables by rep.
- ✓ Implemented and supported by expert SAP Business One consultants.

SOLUTIONS

NovaPOS

Point of sale

NovaPOS brings together checkout, self-service and an interactive map of your store that guides each customer to the product, with an animated route, voice search and a shopping list. And it connects all your branches as if they were one, linked to SAP Business One.

Counter sales and service | Complements InSales | Omnichannel coverage

See it online: idasoftware.com/en/novapos →

SCOPE

A shopping assistant on every screen

The self-service kiosk is also a guide: the customer searches for a product and instantly sees its aisle, side and shelf, with the route drawn from where they stand.

Beacon and animated route — New

The product's zone pulses like a beacon and the path is drawn in neon, around the shelves, from "You are here" to the product.

Search by voice — New

Text, barcode or voice. The customer says "skim milk" and the map shows it, without typing.

"You are here" with QR — New

Each aisle has a QR code. When scanned, the map knows where the customer is and recalculates the route from there.

Smart shopping list

The customer picks several products and the system orders them into a single walk, with no back and forth.

"Also in this aisle"

Shows other products in the same zone: more discovery and a higher average ticket.

From the map to the cart

Photo, price and an "Add to cart" button on the same screen. Finding and buying is a single gesture.

Imagine a screen on every cart

In cart mode, the screen stays on the locator and goes with the customer throughout the store: their list, the next product and the route.

Always at hand — Cart mode

A tablet on the cart is enough: open the cart mode address and it's ready, with nothing special to install.

Faster shopping

Less time searching means more customers served per hour and fewer "where is...?" lines.

A memorable experience

A store that guides its customers with a neon map is unlike any other. It's differentiation visible from the entrance.

All your branches, one single store for the customer

Each store keeps selling even if the internet goes down. When online, a central server syncs them every minute,

without selling the same balance twice or delivering the same order twice.

Who has it? Multi-store
From the register you can see the stock of other branches, and request goods from another store with approval and dispatch.

Buy here, pick up there
The customer pays at one store and picks up at another. The delivering store records it and the selling store sees it on its next sync.

Pay at any branch
Credit invoices from one store can be collected at another, with a receipt. Plus a global credit limit per customer across all stores.

Clear accounts between stores
Settlement report: who owes whom for balances used, collections, pickups and transfers. Exportable to CSV.

Everything your store needs, from checkout to stockroom

Modules you turn on according to what each store needs. What isn't enabled stays out of the way.

Fast checkout
Invoices, credit notes, deliveries, returns and orders in a single panel, with scanner and gapless numbering per register.

Kits and combos
Boxes built by the customer (for example, 6 donuts of their choice) with exact unit control.

Points and promotions
Points earning and redemption, special prices and promotions per customer.

Multi-currency
Payments in several currencies with the daily rate and configurable decimals, validated on the server.

X and Z closing
Partial and final closing with count by denomination, differences by currency and an optional blind close. PDF and Excel.

Daily reconciliation
Sales, collections, returns and movements with the same numbers on screen, in PDF and in Excel.

Home delivery
Sell today, deliver later: inventory drops on delivery, with a delivery note and tracking.

Purchasing
Receiving matched against the purchase order, tolerances, approval of differences and returns to vendor.

Transfers
Dispatch and receipt between stores with a transit warehouse, printable waybill and requests with approval.

Floor salesperson
The salesperson builds the order on their phone and generates a QR code the register scans to charge instantly.

Self-service
Full-screen kiosk: the customer identifies, builds their order and pays at the register. It resets on its own.

Price checker
A lookup screen for the sales floor: scan and see the price, without logging in.

Flexible items
Several barcodes per product and automatic replacement of discontinued items when scanned.

SAP Business One
Documents are saved in the store first and posted to SAP when online, with automatic retries.

Installable apps
Register, Floor, Admin and kiosks install as apps (PWA) from the same site, with guided HTTPS.

Omnichannel with InSales

Counter, sales force and B2B portal working as a single channel.

One catalog Omnichannel

The same products, prices and promotions across every channel.

One customer

Full customer history no matter where they bought.

One inventory

Stock shared with warehouses and with InStock WMS to replenish on time.

What sets it apart

- ✓ The customer can’t find a product: they locate it on the map and follow the route, instead of leaving without buying.
- ✓ This branch is out of stock: you see who has it, request it or sell it for pickup there.
- ✓ The customer wants to pay at another branch: they pay at any store and the invoice updates itself.
- ✓ The internet goes down: you keep selling and everything syncs when the connection returns.
- ✓ Accounts between branches: automatic settlement report, no spreadsheets.
- ✓ Register closing: X/Z closing with the full picture, differences by currency, PDF and Excel.

SOLUTIONS

NEXO AI

Artificial intelligence connected to the ERP

NEXO AI connects Claude, ChatGPT and any MCP-compatible assistant directly to SAP Business One and Odoo. Ask in natural language, get verified figures from your database and prepare documents, with no exports, no copy-paste and no exposed credentials.

Natural language queries | Analysis, summaries and alerts depending on the plan | Document drafts with preview | Final approval always in SAP

See it online: idasoftware.com/en/nexo-ai →

SCOPE

Much more than questions and answers

Curated datasets
Sales, receivables aging, purchasing, stock per warehouse, inventory valuation, P&L, trial balance, cash and banks, with date, branch, salesperson and currency parameters.

Safe dynamic queries
When no dataset fits, the AI generates read-only SQL that NEXO validates, translates to HANA or PostgreSQL and limits before running.

Dashboards and BI-ready data
The AI drafts dashboards and a human publishes them. Endpoints ready for Power BI, Looker and other tools.

Executive summaries
Daily, weekly or monthly summaries with key metrics and variations, delivered to management.

Business alerts
Rules on any dataset: overdue receivables, stock-outs, sales drops. Scheduled evaluation and notifications.

Smart insights
Proactive analysis of customer, collections and inventory risk, and commercial opportunities.

Document Assistant SAP B1
Prepares sales and purchase orders from a conversation, with preview and explicit confirmation. Always as drafts: final approval stays in SAP.

Works with your favorite AI
Claude, ChatGPT, custom MCP clients and WhatsApp. No lock-in to a single provider and no model training on your data.

Ready in hours, not months
Sales, purchasing, inventory, finance and banking catalog from day one. Import your SAP B1 Query Manager queries in one click.

What sets it apart

- ✓ Guaranteed read-only: the validator blocks INSERT, UPDATE, DELETE, DROP and sensitive tables.
- ✓ Per-company isolation at every layer, with the company ID signed in the token.
- ✓ Granular roles: Admin, Analyst, Viewer and Document Preparer.
- ✓ Safe mode per connector and encrypted credentials the assistant never sees.
- ✓ End-to-end auditing: who asked, from which assistant, which SQL ran and which draft was created.
- ✓ Timeouts, rate limits, circuit breakers and row limits per query.

SOLUTIONS

NovaDocs

AI-powered intelligent document processing

Invoices, purchase orders, delivery notes and more arrive as PDFs, scans or photos in a mailbox, a folder or WhatsApp. NovaDocs reads them with AI, validates them against your ERP and gets them ready in SAP Business One, with no typing and human approval where it matters.

- Email, shared folder or WhatsApp
- Validation against purchase orders and receipts
- Posting to SAP Business One with approval
- Learns from every correction

See it online: idasoftware.com/en/novadocs →

SCOPE

What no OCR does

Features designed by IDA to go far beyond reading text.

Learns from every correction

IDA innovation

When someone fixes a field, NovaDocs remembers it for that vendor. Accuracy improves with use, without retraining or templates.

Fraud guardian

IDA innovation

Detects duplicate invoices, out-of-pattern amounts and changes to vendor bank details before they get paid.

Automatic reply to sender

IDA innovation

If the PO is missing, the tax ID does not match or the document is unreadable, NovaDocs replies to the vendor explaining what to fix.

Invoices via WhatsApp

IDA innovation

Drivers, sales reps or vendors snap a photo and send it via WhatsApp. NovaDocs processes it just like a PDF.

Ask your documents

With NEXO AI

With NEXO AI: "which invoices from this vendor are due this week?" or "show me the PO for this invoice", in plain language.

Field-by-field confidence

Every extracted value comes with a confidence score. Your team only reviews what is uncertain, not the whole document.

Documents it processes

Vendor invoices

Header, lines, taxes and totals, linked to the purchase order and goods receipt.

Goods receipts

Records what was received against the purchase order and completes the 3-way match: order, receipt and invoice.

Purchase orders

Turns quotes or orders received into purchase orders and warns when prices drift from history.

Customer purchase orders

The order your customer emails becomes a sales order in SAP with their price list, stock check and delivery date.

Delivery notes and waybills
Receipts and shipments recorded with their digital proof attached.

Credit and debit notes
Automatically linked to the original invoice.

Payment and withholding receipts
Reconciled against open vendor or customer invoices.

Other documents
Contracts, certificates and supporting files classified and archived with the ERP record.

It comes in the way it already arrives

No change to your vendors' or customers' habits.

Microsoft 365 email
Reads the invoice mailbox via Microsoft Graph and picks up PDF, image, XML or JSON attachments.

IMAP email
Works with any email provider: Gmail, Zoho or your own hosting.

Shared folder
Ideal for scanners: whatever lands in the folder is processed, and anything that fails is set aside for review.

Manual upload
Drag and drop one or several files at once from the portal.

WhatsApp and vendor portal
Photos via WhatsApp and invoices the vendor uploads themselves, with their status in view.

Channel health
Metrics per channel, last error with a suggested fix and an email alert after 3 failures in a row.

Validated against SAP Business One before it lands

NovaDocs queries SAP in read-only mode to stop the errors that today are found too late.

3-way match 3-way
Cross-checks the invoice with the purchase order and goods receipt: quantities, prices and open items.

Price variance
Warns when a purchase order price drifts from the last price paid.

Real duplicates
Detects the same invoice even when it arrives scanned and as a native PDF, or with the number written differently.

Business partner
Checks that the vendor or customer exists and is active, finding it by tax ID or name.

Items and accounts
Matches each line to a valid item or G/L account, with suggestions based on that partner's purchase history.

Totals and taxes
Checks that lines, taxes and total add up, and requires a due date when applicable.

Your team only touches what needs attention

What is correct moves on by your rules; what is uncertain reaches the right person with the original alongside.

Command center
Today's pending items, ready for SAP, errors, average time to SAP, hours saved and AI spend for the month.

Review screen
The original next to the extracted data, highlighting where each value came from, with inline correction and one-click discard of unrelated files.

Approval rules
By partner, amount, currency or document type: auto-approve, request approval or send to review.

Approval from your phone Mobile
The approver gets a secure single-use link, sees the summary and lines and approves or rejects with a reason, without logging in.

Full history
Each document keeps its timeline: receipt, reading, validations, corrections, approvals and delivery to SAP.

Safe retries
If SAP does not respond, the document is flagged with the error and retried without duplicating.

Vendor portal

A simple space where each vendor submits invoices and tracks their status, with no calls or "did you get my invoice?" emails.

No passwords Portal
The vendor signs in with a magic link sent to their email.

Up to 10 files at once
Uploads invoices from a computer or phone, in Spanish or English.

Status in view
Received, In review, Accepted or Rejected, with the reason when rejected.

SAP partners only
You invite vendors that exist in SAP, resend invitations or revoke access instantly.

Vendor already identified
Documents arrive linked to their business partner, ready to validate.

To each their own
Each vendor sees only their own documents.

Artificial intelligence under your control

Each company picks its AI provider and model, with its own key, and controls what it spends.

OpenAI or Anthropic No lock-in
With your company's key and the model you prefer. A document can be reprocessed with another provider or model.

Two-step classification
A low-cost model discards newsletters, logos and unrelated files before paying for the full read.

Monthly budget
Monthly spend per model; when the cap is reached, processing pauses and admins are notified. Nothing is lost: documents wait.

Partner memory
Remembers how each vendor or customer was corrected and applies it next time; if a person corrects the document type, their decision prevails.

Control, security and compliance

Safe for your SAP Service Layer
Never writes directly to the database: it reads in read-only mode and creates documents through the official Service Layer, respecting SAP validations and permissions.

Tax validation
Checks tax IDs, tax calculations and withholdings according to your rules.

Archive and traceability
The original stays linked to the SAP document, with a history of who reviewed, corrected and approved.

Roles and permissions
Viewer, reviewer and admin profiles per company; the AI key is stored encrypted.

Nightly backup
Daily copy of the originals with integrity verification and a restore guide.

Multi-company and bilingual
Data, channels, rules and AI kept separate per company, with an interface in Spanish and English.

What sets it apart

- ✓ Not just OCR: it understands the document and validates it against your ERP before posting.
- ✓ No per-vendor templates: works with new formats from the very first document.
- ✓ Native to SAP Business One, built by consultants with more than 14 years of SAP experience.
- ✓ Human in control: drafts, exception queue and approvals where it matters, even from your phone.
- ✓ Safe for your SAP: it never writes directly to the database; everything goes through the official Service Layer.
- ✓ Your vendors see the status of their invoices in their own portal, with no calls.
- ✓ AI of your choice, with a budget: no single-provider lock-in and no surprises.
- ✓ Part of the IDA ecosystem: integrates with NEXO AI, InStock WMS and InSales.

ADD-ONS AND MORE SOLUTIONS

Much more than our core solutions

Add-ons, integrations and reports that extend SAP Business One and other ERPs to cover your company processes.

Bank reconciliation

Speeds up reconciling your bank accounts against SAP Business One and cuts manual work at closing.

Vendor payments

Prepare, control and post vendor payments in SAP Business One with order and traceability.

Web services and integrations

Web services to connect your ERP with other systems, portals, apps and business partners.

Portals and dashboards

Web portals and KPI dashboards so every team sees the information it needs.

Report library

Many ready-built reports, ready to use and adaptable to your operation.

Custom development

Need something different? We design and build it on top of your ERP.

LET'S TALK

Which solution fits your company?

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