

SRM Release Notes

Version 7.0

September 2026



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QAD SRM 7.0.0 is a General Availability (GA) cloud release. For SRM product life-cycle details, please refer to the [product lifecycle web page](#).

The user interface is only supported on current versions of the Chrome, Safari, and Edge web browsers. Although you can use other web browsers, you may encounter differing levels of performance and user experience. Some functionality may not be available.

The following sections contain an overview of the new features in this release.

Overview

QAD SRM 7.0.0 delivers an enterprise-grade release introducing QAD SRM Champion Assist version 7.0.0 alongside advanced sourcing governance, taxonomy framework modernization, granular classification controls, and expanded master data API v2 capabilities. Building upon the foundational platform updates introduced in QAD SRM 6.6.0, version 7.0.0 integrates conversational reasoning, automated nomination justification generation, external risk intelligence, and automated master data cleanup alongside automated proxy approver routing, intelligent sourcing request notifications, multi-action classification workflows, and enhanced credential security directly into your core procurement and system administration operations.

This release equips Strategic Buyers, Commodity Managers, Master Data Administrators, and System Administrators with intelligent AI decision support, expanded status automation, fine-grained access permissions, and rich integration capabilities while maintaining seamless backward compatibility across your enterprise landscape.

SRM Champion Assist

Key Capabilities & Features

1. Smart Bid Analysis & Interactive Award Recommendations

Strategic buyers can now query Champion Assist using natural language to perform dynamic multi-scenario bid evaluations across large-scale RFQ events.

- **Multi-Factor Evaluation:** Champion Assist analyzes Total Cost of Ownership (TCO), lead times, maintenance fees, Strategic Supplier Assessment (SSA) data, and taxonomy-specific properties across single-sourcing, dual-sourcing, and cherry-picking scenarios.
- **Granular Side-by-Side Comparisons:** Evaluate specific line items against overall event averages or run side-by-side performance-versus-cost comparisons.
- **Large Event Scaling:** Leverages an asynchronous framework to process large multi-line, multi-supplier YAML comparison exports without exceeding system context limits.

2. Automated Award Draft Generation

Champion Assist eliminates manual report creation by automating the synthesis of award justification, reducing preparation time from hours to minutes.

- **Champion Assist gathers and synthesizes** sourcing data, supplier scorecards, historical insights, and landed cost vs. target "should-cost" figures.
- **Interactive Conversational Refinement:** Refine, expand, or remove specific Justification sections (such as geopolitical risk or quota split justifications) through natural language before copying it into desired documents.

3. Real-Time External Supplier Risk & Intelligence

Incorporate live external market data directly into sourcing evaluations to safeguard supply chain resilience.

- **Web Signal Synthesis:** Continuously monitors external news, financial filings, litigation, ESG indices, and geopolitical events to generate a 1–100 Web Risk Score.
- **Site-Specific Risk Contextualization:** Differentiates between corporate headquarters and exact shipping plant locations (such as, evaluating a local European plant versus a main overseas site) to avoid inaccurate regional risk assessments.
- **Data Contradiction Alerts:** Flags discrepancies between internal high performance ratings and emerging external red flags (such as sudden bankruptcy filings or labor disputes).

4. Natural Language Supplier Scouting

Expand your supply base beyond internal databases through global external web discovery.

- **Constraint-Based Search:** Search for non-registered vendors using parameters like material group, geographic site, financial thresholds, and quality certifications (e.g., ISO 9001, IATF 16949).
- **Automated Duplicate Filtering:** Applies a negative search filter against existing QAD SRM master vendor records to prevent duplicate vendor profiles.

5. AI Supplier Master Data Hygiene (Duplicate Check)

Maintain a clean single source of truth across vendor master records using multi-vector fuzzy matching.

The Agent has been upgraded to support AI-driven duplicate identification across supplier data. Given a single identifying parameter (such as supplier name, region, country, or supplier number), Champion Assist dynamically narrows down the dataset and presents recommended potential duplicates to the buyer for evaluation and merging. Now, it requires only one matching identifier field to scan large vendor bases and suggest duplicate company matches.

The Deduplication Agent inside Sourcing Champion acts as a read-only specialist that identifies duplicate supplier records in SRM, computes rule-based match confidence scores, explains findings in natural language, and recommends profile retention/cleanup strategies without modifying SRM data.

- **Rule-Based Match Scoring:** Calculated via deterministic point allocation across available fields—Supplier Number (25 pts), DUNS (25 pts), Company Name (25 pts, ignoring legal forms/tags), Postcode + Country (12 pts), City (8 pts), and Street (5 pts). Scores $\geq 70\%$ classify as duplicates; records lacking shared DUNS/Supplier Number are capped at 70% for human review.
- **Smart Retention Recommendation:** Evaluates profile completeness (filled attributes, scored evaluations, linked materials/divisions, open RFQ activity, record age) to recommend the primary record to keep and advise on field values to migrate.
- **Conversational Search & Safety:** Supports single-supplier checks, group filtering (by country, city, or name keyword), two-record comparisons, and structured cleanup action plans. Operates in read-only mode and strictly refuses automated merge/edit commands.
- **Filtering Boundaries:** Scans all vendor records automatically when lists contain 100 or fewer records. On larger lists, prompts buyers to narrow queries by country, city, or name to prevent API execution timeouts.

6. Historical Performance Insights for Award Rationales

Provides Champion Assist with an automated API endpoint

(GET/v2/events/{eventId}/rfq/historical-insights) to retrieve aggregated historical quoting data and win-rate analytics strictly grounded in actual past supplier awards across a 36-month rolling window.

- **Security & Data Access:** Validates event IDs as 32-character hex strings and verifies AUTH_EVENT_VIEW, AUTH_EVENT_QUOTES, and AUTH_EVENT_PARTICIPANTS permissions (bypassing past event ACLs by design for historical context).
- **Aggregation Rules:** Evaluates main SourcingItemQuotes linked to 'Awarded' or 'Nominated' sets, automatically converting past currencies using the current event's exchangeRateSet.
- **Calculated Metrics:** Calculates itemWinRate, volumeWinRate, shareOfMaterialItemAward, lastAwardedEvent details, and topCompetitorsNotInRfq (up to 3 non-participating market leaders) grouped by MaterialItems.

7. Event Participants V2 REST API for AI Agents

Provides Champion Assist and client applications with a structured v2 REST API endpoint (GET /v2/events/{eventId}/participants) to analyze event participant status and access rights under user-delegated authorization.

- **User-Delegated Security:** Authenticates via OAuth2 Bearer token (read:sourcing scope) enforcing user-delegated AUTH_EVENT_PARTICIPANTS authority at global or local event level.
- **Semantic AI Specification:** Excludes heavy payload fields by default while embedding rich semantic OpenAPI descriptions so LLMs understand business context.
- **Dynamic Filtering & Hypermedia:** Supports dynamic field selection via X-Requested-Fields header and contextual hypermedia links via X-Verbose=true.

New and Enhanced APIs

Champion Assist 7.0 relies on an updated suite of high-performance V2 APIs:

Endpoint	Method	Description
/v2/events/query-properties	GET	Discovers available event query.
/v2/events	GET	Lists RFQ events matching active or closing criteria.
/v2/events/{eventId}/rfq	GET	Retrieves streamlined RFQ structural context, active rounds, and participants.

/v2/event/{eventId}/rfq/comparison/jobs	POST	Initiates asynchronous bid comparison job aggregation.
/v2/event/{eventId}/rfq/comparison/jobs/{pid}/status	GET	Polls asynchronous job processing status.
/v2/event/{eventId}/rfq/comparison/jobs/{pid}/result	GET	Retrieves AI-optimized YAML comparison data payload.
/v2/events/{eventId}/rfq-nominations-sets	GET	Fetches awarded supplier volume and nomination allocations.
/v1/companies/preregister	POST	Triggers supplier pre-registration invitations from scouting results.*
/v2/events/{eventId}/rfq/historical-insights	GET	Retrieves aggregated historical quoting performance data, awarded values, win rates, and market share metrics across a 36-month rolling window for AI award rationale generation.
/v2/events/{eventId}/participants	GET	Retrieves a paginated list of event participants with lightweight defaults, semantic AI descriptions, X-Requested-Fields filtering, and X-Verbose hypermedia references.

***Note:** This release uses v1 APIs. Because AI capabilities strictly require v2 APIs, automated Supplier record creation has been deferred to a future release.

Champion Assist Design Artifacts

Strategic Supplier Positioning & Macro View

Strategic Supplier Positioning

Region: All Date range: 01/01/2026 - 31/01/2026 Period: Closed

Top Recommendation
Supplier A Best balance of low risk and performance.

Second Recommendation
Supplier D Reliable and stable alternative.

Monitor Closely
Supplier B Higher risk levels reduce suitability.

Strategic Supplier Comparison

EMEA

APAC

Americas

Export

#	Supplier	Business scope	RFQ	Supplier Status	Country	FRI ¹	ESG risk ²	FSA status	Cyber risk	Comments & Re
1	Supplier A	Launch supplier deep dive		Preferred	TR	Medium	Medium	Low	Medium	
2	Supplier B		X	Preferred	PL	Low	Medium	Low	High	
3	Supplier C		X	Preferred	AL	Low	Low	Low	Low	Rejected
4	Supplier D		X	Preferred	DE	Medium	Low	Medium	tbd	
5	Supplier E		X	Preferred	TN	Low	Medium	Low	Low	Rejected

SRM Champion

I can help you compare key SRM metrics to evaluate supplier performance and make better decisions.
Here are some metrics we can explore together:

On-Time Delivery: Measures how reliably the supplier meets agreed delivery dates.

Strategic Supplier Comparison: Identifies suppliers that are critical to your business due to their impact on cost, innovation, or supply continuity.

Strategic Supplier Comparison: Identifies suppliers that are critical to your business due to their impact on cost, innovation, or supply continuity.

Supplier A - Turkey (TR) Strong and balanced performance; top candidate.
Supplier B - Poland (PL) Higher ESG and cyber risks; needs attention.
Supplier C - Albania (AL) Good performance but rejected; likely external factors.
Supplier D - Germany (DE) Stable but average; suitable as backup.
Supplier E - Tunisia (TN) Acceptable performance but rejected.

Recommendation
Based on the comparison, Turkey (TR) stands out as the most suitable Strategic Supplier, combining low risk with consistent performance across key dimensions.
Germany (DE) could be considered as a backup option, while Poland (PL) would require further risk assessment.

What insights are you looking for?

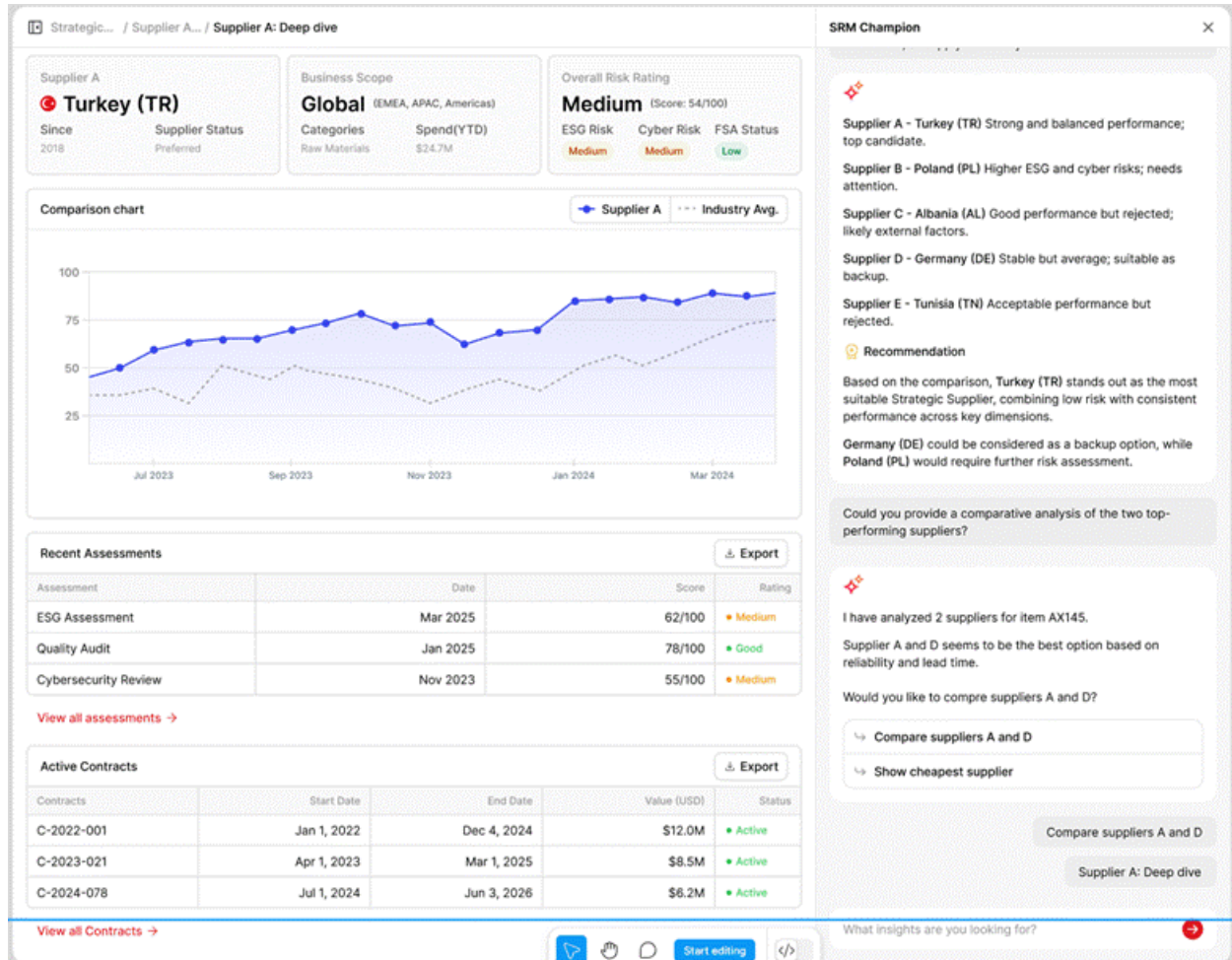
Strategic Supplier Positioning Canvas: Champion Assist categorizes suppliers into automated tier recommendations (Top, Alternative, Monitor Closely) alongside an interactive supplier grid. The table aggregates regional scope, operational status, financial risk (FRI), ESG risk, and cyber risk flags to give buyers a complete macro view before making sourcing decisions.

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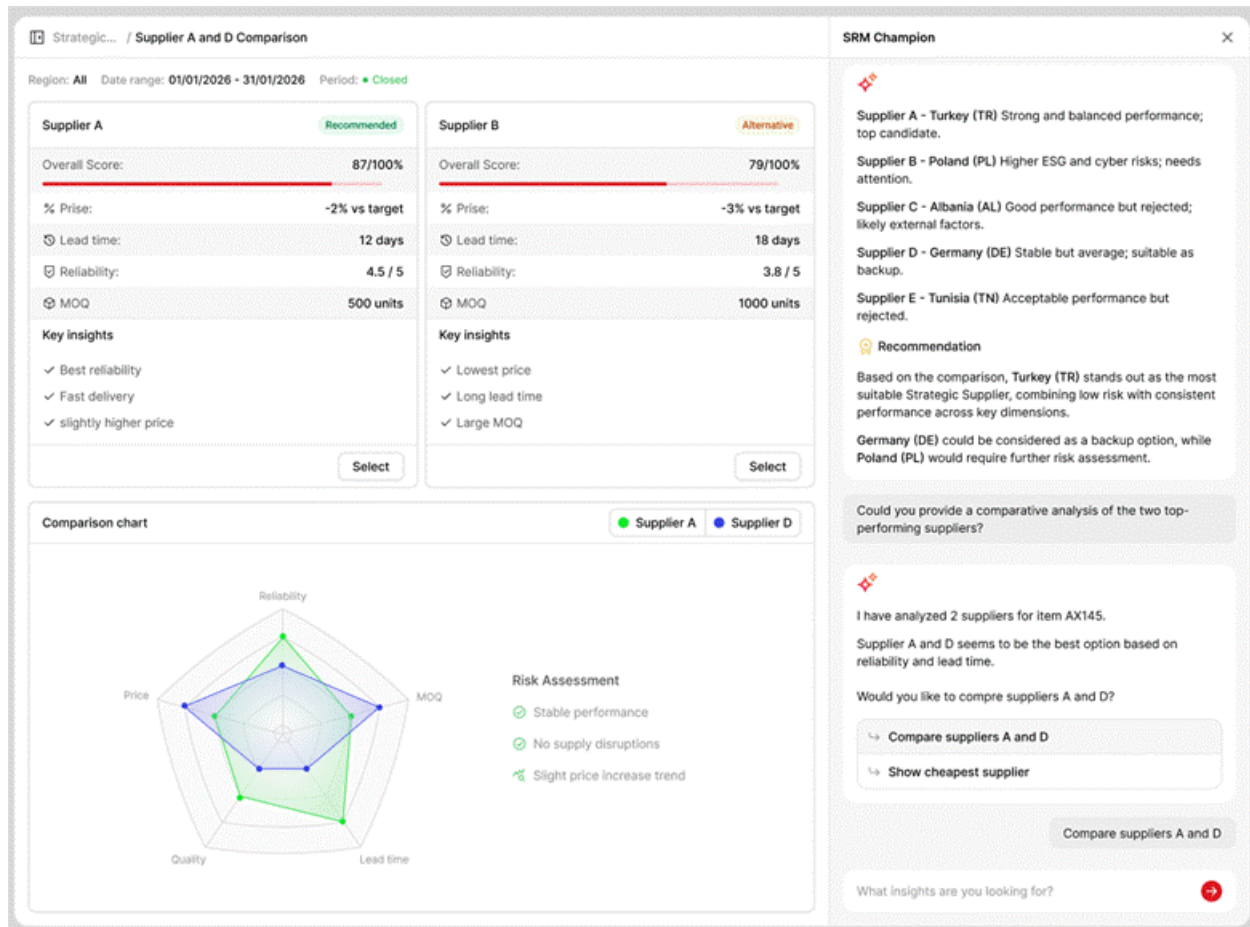
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Supplier Deep Dive & Historical Trends



Supplier Deep Dive Workspace: Selecting a vendor opens a granular analytics canvas comparing individual score performance against industry averages over time. Buyers can review active contracts, spend totals, and historical assessment audits (ESG, Quality, Cybersecurity) while leveraging contextual conversational prompts in the right-hand Champion panel.

Side-by-Side Radar Trade-off Comparison



Multi-Factor Radar Chart Comparison: Enables side-by-side trade-off evaluations between top candidate suppliers across core dimensions—including Price, Lead Time, Reliability, Quality, and MOQ. Dynamic risk assessment summaries highlight operational trade-offs (e.g., lower unit cost vs. longer lead times) to support data-backed award decisions.

SRM General Functionality

Sourcing and RFQ Enhancements

Proxy Option for External Approvers

During an active RFQ approval workflow (status Pending), buyers can now substitute an unavailable external approver without restarting or resetting the entire approval process.

Under the approval tracking interface, buyers can select Replace Approver and enter the email address of a substitute approver. System behaviors include:

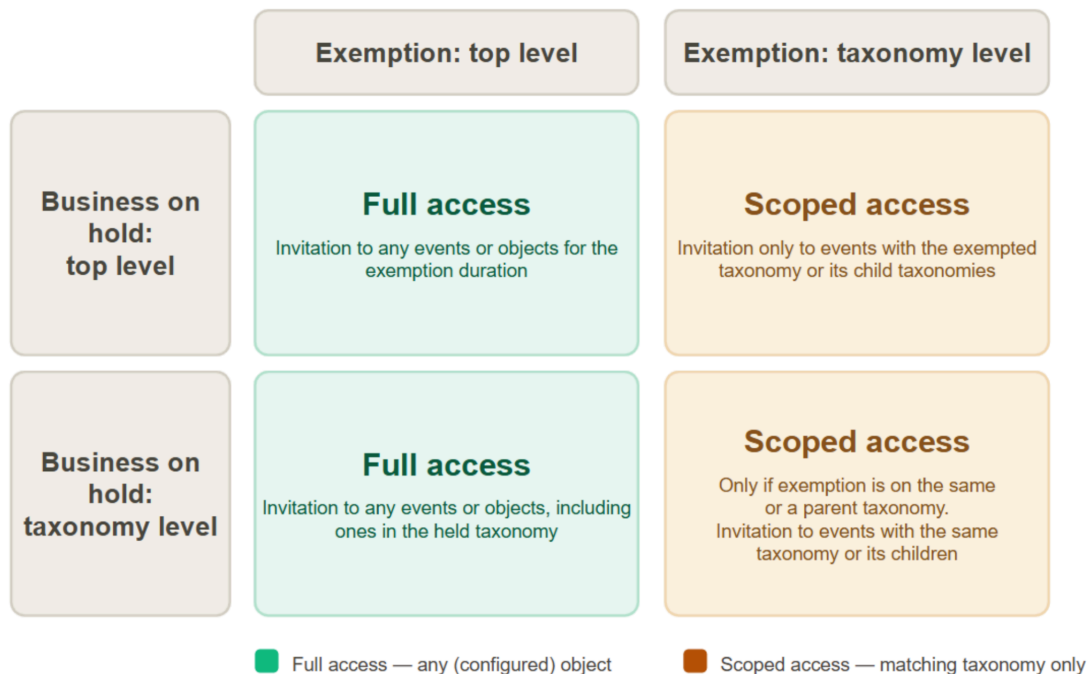
- **Access Control:** The system deactivates the original approver's access link, preventing late submissions.
- **Status Updates:** The status in the approvals panel updates to 'Replaced', displaying the substitute's email address in the audit comments.
- **Notification Routing:** An automated approval request email with a valid access link is dispatched immediately to the replacement approver.
- **Decision Consolidation:** Decisions submitted by the new approver are consolidated into the single approval entry with the exact same weight as the original approver.
- **Workflow Continuity:** Existing approval decisions from other internal or external approvers in the workflow are fully preserved.
- **Audit Logging:** The substitution action is recorded in the RFQ event log ('Approver A was replaced by Approver B by [User Name] on [Date/Time]').

RFQ Block Exemptions for Business Hold [Open4RFQ]

Introduces standard RFQ block exemption governance (based on Open4RFQ functionality) allowing purchasing managers to grant temporary exemptions for blocked suppliers on top level or specific taxonomy levels, enabling critical suppliers on business hold to be invited to sourcing events.

- **Status Panel & Visual Indicators:** Displays a read-only 'Block exemption' indicator and a 'Block exemptions' management fieldset in the supplier Status panel, allowing authorized users to create and remove exemptions with mandatory 'Valid until' dates and audit reasons.
- **Taxonomy & Hierarchy Scope:** Exemptions apply globally (if no taxonomy is selected) or specifically to matched material groups, organizations, or regions (and cascaded child nodes). Mouseover tooltips on event invitation icons display active exemption scopes.
- **Configuration & Automated Expiration Job:** Configured under Events > General > Participant-Filter via 'Use exemptions' checkboxes. A daily automated job (UpdateBlockExemptionsJob) automatically clears expired exemptions and updates block flags.

- **Permissions & Audit Logging:** Enforces dedicated permission authorities (AUTH_SUPPLIERS_BLOCK_EXEMPTIONS_VIEW, CREATE_GLOBAL, DELETE, DELETE_ALL, EDIT_TAXONOMY_BLOCK_EXEMPTIONS_TAX/ALL) and logs all exemption additions and removals in the supplier revision audit log.



Searchable Autocomplete Selection for Approvers

Approver selection fields across the platform have been upgraded from standard dropdown menus to Searchable Autocomplete Select controls to streamline user selection in enterprise environments with large approver volumes (for example, 800 approvers).

Key functional enhancements include:

- **Type-to-Filter Search:** Users can type characters directly into the Approver field to instantly filter large approver lists dynamically.
- **Show-All Caret Control:** A dedicated down-arrow caret button allows users to open and scroll the full approver list manually if preferred.
- **Visual Search Hints:** Includes an embedded search icon, placeholder text ('Type to search...'), and informative tooltips ('Type to search the list, or use the arrow to show all entries.').
- **Strict Data Integrity:** Free-text entries that do not match valid role list entries are rejected upon field blur. Mandatory approval validation rules remain fully enforced.

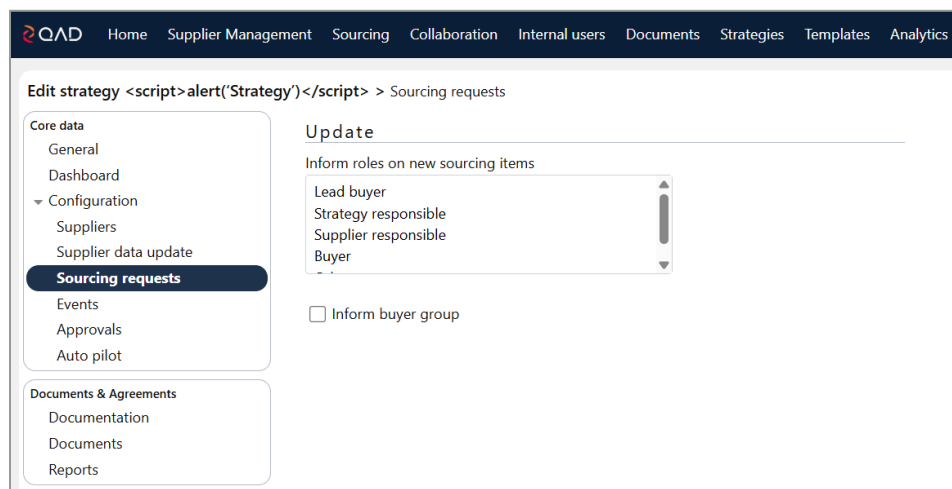
For complete user experience consistency, this control is deployed across all four Request-Approval screens:

1. **RFQ Nomination Request Approval:** CreateNominationsSetApprovalNominationController
2. **RFQ Participation Request Approval:** CreateEventParticipantApprovalParticipationController
3. **RFQ Round-Phase Participation Approval:**
CreateEventParticipantApprovalRoundPhaseParticipationController
4. **MDM / Project Task Create Approval:** EditTaskCreateApprovalController

Sourcing Request Notifications and Reminders

To streamline sourcing workflows, the system now provides automated, taxonomy-matched notifications and scheduled reminders for sourcing requests:

- **Taxonomy & Wildcard Matching:** Sourcing requests created or updated in status 'New' trigger notifications based on Material Groups (MAT), Organizations (ORG), and Regions (REG) configured in strategy settings. Empty taxonomy fields act as wildcards ('ALL selected').
- **Buyer Group Routing:** Enabling the 'Inform buyer group' option in Strategy settings routes email notifications to internal users whose profile Buyer Group matches the assigned Buyer Group on the sourcing request.
- **Email Consolidation:** Sourcing requests created or updated concurrently via batch upload or automated API interfaces are consolidated into a single email summary per recipient containing a 7-column data table and direct item deep links.
- **Weekly Reminders & Suppression:** A scheduled background job dispatches weekly reminder emails on Monday mornings for unprocessed sourcing requests. Notifications can be globally enabled or disabled via the system email suppression list.
- **Strategy UI Placement:** Under Strategies > Configuration, a dedicated Sourcing requests menu item is located strictly between Supplier data update and Events.



Sourcing Request Screen Configuration Reset and Messaging

The Sourcing Request screen configuration tool has been updated to include a standard reset capability, enabling administrators to return layout parameters to default settings effortlessly. In addition, system warning messages across the configuration interface have been updated to clear, user-friendly text.

Consistent Language Translation for Supplier Agreements

Ensures that auction participation agreement screens render entirely in the active UI session language selected via the top-right Globe Icon / Language Menu, resolving mixed-language displays for supplier users.

- Session Language Primacy: Selecting a session language dynamically overrides the static user account setting (User account -> Personal information -> Country-specific settings) for rendering agreement text during the active session.
- Complete Screen Consistency: Ensures 100% language alignment across all screen components simultaneously, including top navigation, breadcrumbs, action buttons (Accept, Reject participation, Leave), left-side information panels, and main agreement body text.

Screen Configurator Consolidated Improvements

Release 7.0.0 incorporates the Visual Screen Configurator capabilities introduced in 6.6.0 alongside the relevant bug fixes from the 6.6.x branch:

- Edit Supplier Screen Configuration: Saved screen configurations (field hiding, field ordering, and mandatory rules) are now properly applied on the Edit Supplier master data screen.
- Mandatory Picker Validation: Empty category and tag pickers are properly recognized as empty, preventing form saves when set as mandatory.
- Custom Property Section Integrity: Resolved issues where duplicate field names across sections caused Custom Property fields to vanish or position incorrectly.
- System-Mandatory Field Guardrails: System-mandated fields remain locked and cannot be set to hidden in the Visual Editor.
- JSON Role-Based Field Read-Only Control: Supports configuring role-based field write locks directly within the JSON configuration payload.

Supplier Management Updates

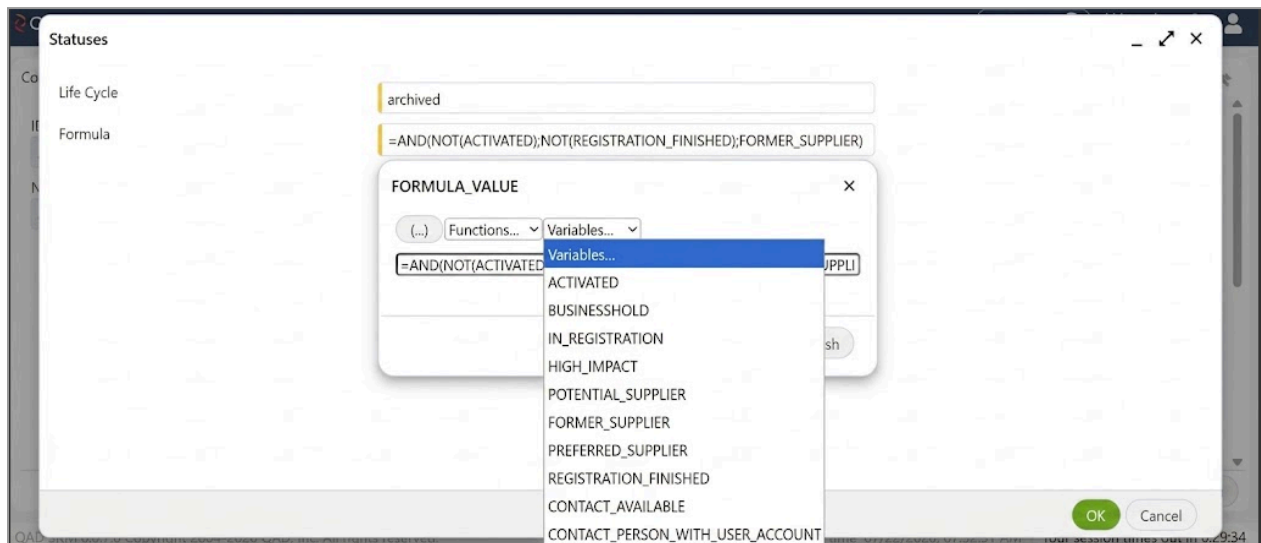
Granular Supplier Data Lifecycle Variables

System administrators can now create more precise supplier lifecycle statuses (such as 'Strategic Partner').

Where to configure: System Administrators can configure lifecycle statuses under Back Office > System Configuration > Suppliers > Supplier Data Lifecycle Status.

To configure, perform the following steps:

1. Navigate to the Supplier Data Lifecycle Status configuration screen in the Back Office.
2. Click Add to create a new status entry or select an existing status row to modify.
3. In the pop-up configuration window, define the Life Cycle display name (e.g., Strategic Partner or Archived).
4. Build the condition in the Formula field using standard Excel-style functions (AND, OR, NOT).
5. The parser now accepts the following additional supplier status variables from the dropdown selection list:
 - BUSINESS_HOLD (or businessHold)
 - HIGH_IMPACT (or highImpact)
 - POTENTIAL_SUPPLIER (or potentialSupplier)
 - FORMER_SUPPLIER (or formerSupplier)
 - PREFERRED_SUPPLIER (or preferredSupplier)



Formulas evaluating these variables update the Life Cycle Status field upon supplier record modification. Additionally, the default formula for the 'Archived' status has been updated to incorporate the former supplier flag:

Updated Default Archived Formula:

=AND(NOT(ACTIVATED);NOT(REGISTRATION_FINISHED);FORMER_SUPPLIER)

The batch execution job UpdateSupplierStatusJob recalculates these lifecycle statuses across all existing supplier records based on the new logic.

Taxonomy Status Aggregation to Top Level

A new setting is available under System Configuration > Suppliers > Taxonomies > Automated status update. This feature aggregates the calculated status of a designated taxonomy tree (divisions, materials, or regions) up to top-level supplier status attributes. Administrators can map source taxonomy status values directly to top-level fields, eliminating manual entry and providing immediate visibility into overall supplier status.

Configurable Supplier Creation Wizard Options and Activation Control

Administrators can restrict creation modes and initial supplier status parameters available in the supplier creation wizard under System Configuration > Suppliers > Registration > Create company wizard:

- Option 1: Creates supplier record with deactivated accounts.
- Option 2: Creates supplier with activated accounts using the 'Default role for Suppliers in registration' (or 'Default role for Suppliers' if no registration role exists). Option 2 is now visible by default.
- Option 3: Creates supplier with activated accounts using the 'Default role for Suppliers'.
- Activation Flags on Creation: Administrators can configure 'Activate supplier when created with wizard' and 'Activate supplier when created as empty company' checkboxes (both ticked by default). Unticking forces newly created supplier records to an initial active=false status.
- Default Option Priority: Refined default option priority dynamically evaluates whether a contact person is created alongside the supplier record.
- Configurable Document Type Order and Access in Creation Wizard.
- The supplier creation wizard documents panel has been enhanced to accommodate varied document workflows:
 - Expanded Button Visibility: The Add document button is now accessible to users holding any document creation authority (*_CREATE_attachment, *_CREATE_contract, *_CREATE_certificate, *_CREATE_mandatory), removing the rigid prerequisite for mandatory attachment permissions.
 - Customizable Fallback Order: Administrators can define the preferred fallback order of document types using the 'Order of document type default' configuration field (default: mandatory,contract,certificate,attachment,report,rating,ratingAnalysis).
 - Dynamic Panel Suppression: If a user lacks creation permissions for all document types defined in the configuration, the entire Documents panel is hidden automatically in the wizard.

Deactivated Default Status for Accounts in Registration

To prevent premature system access, newly created user accounts within supplier records currently in registration status are now created as disabled by default.

If a site default registration role exists and the supplier record reaches completed registration, newly added accounts continue to be created in active status. This policy applies to both 'Create user account' and 'Create default user account' UI actions within the supplier record.

Individual Contact Registration Link

Buyers can now dispatch registration links directly to specific contacts from within the contact person view. When a contact person has a user account and the supplier is in registration status (inRegistration=true, registrationFinished=false), the Send registration link action menu item triggers an email targeted strictly to that contact's user account rather than dispatching links to all supplier accounts.

Classifications and Taxonomies

Modernized Taxonomy Cluster Management (GUI Migration & Multi-Select)

Management of taxonomy clusters has been migrated from XML bean definitions to a dedicated GUI interface located at Back Office > System Configurations > General > Taxonomies > Taxonomy clusters.

- **Multi-Cluster Selection:** Under Master data > Category Trees > Classification > Properties, the 'Taxonomy clusters' field now supports selecting multiple clusters for a single material group.
- **Flexible Visibility Logic:** Custom property panels and fields assigned to taxonomy clusters now utilize OR evaluation logic. A property displays if at least one assigned cluster matches the clusters assigned to the material group.
- **Visual Icon Indicators:** Administrators can assign Font Awesome icons to individual taxonomy clusters (e.g., distinguishing Plant vs. Division levels). Icons display in taxonomy lists across supplier records and global taxonomy views.
- **Automated Migration:** A technical migration patch automatically transfers existing XML cluster definitions into the new GUI structure while preserving variable names and localization codes.

Configuration

ID

Name

astras.platform.core.taxonomy.clusters.codes

Taxonomy clusters

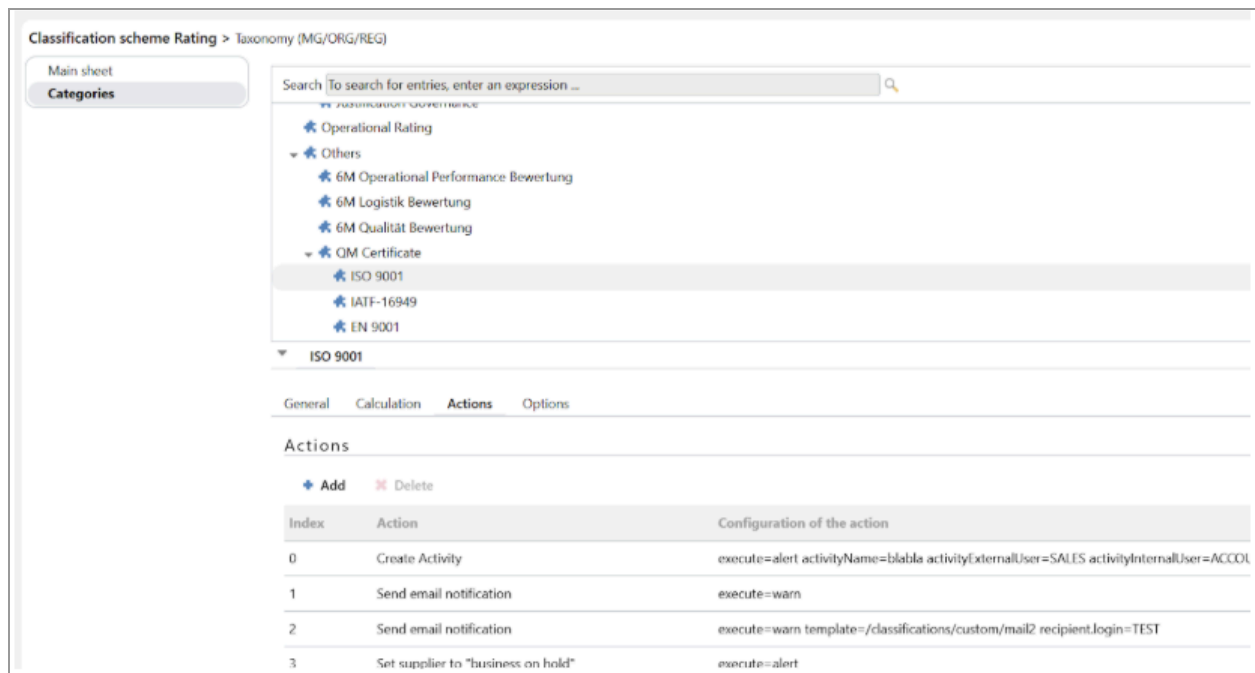
Add
Delete

Cluster	Row style
Stamping	font-weight:bold; color:blue;

Multiple Actions per Classification Category

Administrators can now orchestrate multi-step business logic triggered by classification updates. Located under Back Office > Master Data > Classification Scheme > Categories, a dedicated Actions tab replaces single-action configuration fields.

- Sequential Execution: Actions execute sequentially according to a mandatory, unique integer index (Execution Order).
- Independent Transactions & Error Resilience: Each configured action operates in its own transaction. If an action fails, the system logs the error to the system log and proceeds to execute subsequent actions in the sequence.
- Backward Compatibility & Migration: An automated patch moves legacy single-action setups to the new grid structure with an assigned execution order of 1. XML Import/Export functions fully support the list-based action structure.



Top-Down Classification Value Inheritance

A new classification action, 'Push values from top to bottom for divisions', enables updates at top levels to cascade down through organizational structures.

- **Configurable Scope:** The inheritanceScope parameter defines whether values push from 'Top-Level to Parent Taxonomy level', 'Parent taxonomy level to Child taxonomy level', or 'Both'.
- **Execution Rules:** Supports standard execution conditions (execute=always, execute=warn, execute=alert).
- **Data Integrity & Circular Protection:** Pushes apply strictly to target categories sharing the same variable name. The UI actively prevents selecting opposing top-to-bottom and bottom-to-top push actions simultaneously.

The screenshot shows the QAD SRM-KPIs configuration interface. The top navigation bar includes 'Main page', 'User accounts', 'Master data', 'System configuration', 'Tools', 'Reports', and 'Front end'. The main content area is titled 'Classification scheme SRM-KPIs > Taxonomy (MG/ORG/REG)'. On the left, there is a 'Main sheet' tab and a 'Categories' list. The 'Categories' list shows 'SRMKPI_en' expanded, revealing 'Competitiveness of Pricing_en [SRMKPI1]' and its sub-items: 'Supplier Defect Rate_en [SRMKPI2]', 'Emergency Purchase Rate_en [SRMKPI3]', 'Purchase Order Cycle Time_en [SRMKPI4]', 'Cost per Purchase Order_en [SRMKPI5]', and 'Vendor Availability_en [SRMKPI6]'. The 'Competitiveness of Pricing_de' category is selected, and its configuration is shown in the 'General' tab. The configuration includes fields for 'ID' (2c9c80879d76ceb6019d76cfdce05621), 'Description', 'Input field' (TEXT), 'Number format of the value' (0), and 'Column number in the supplier list' (0: SRM-KPIs -> Competitiveness of Pricing_en). On the right, there are fields for 'Warning value', 'Alarm value', and a checkbox for 'The higher value is better' (checked). Below these is a section for 'Configuration of the action' with a dropdown for 'Push values from top to bottom for divisions' and a text area containing 'execute=always' and 'inheritanceScope=topLevel'. At the bottom right, there are 'OK' and 'Cancel' buttons.

Automated Dynamic Business Hold

Supplier risk mitigation and reinstatement can now be automated based on classification values. Administrators can configure the action 'Calculate and set business on Hold dynamically' within classification categories:

- **Threshold Evaluation:** When a classification value updates (manually or via UpdateSupplierClassificationsJob), the system sets Business on Hold to TRUE if the value is less than or equal to the defined Alarm Value. If the value exceeds the Alarm Value, Business on Hold is set to FALSE.
- **Scope & Hierarchy Protection:** Header-level classifications control the global supplier hold status, while taxonomy-level classifications control node-specific holds. Clearing a hold at a taxonomy sub-node will not override a global manual business hold.
- **Fine-Grained View and Edit Permissions for Classifications**
- **Access controls for classification categories** have been expanded to separate viewing rights from editing rights and distinguish top-level permissions from taxonomy-level permissions:
- **Permission Hierarchy:** Under AUTH_SUPPLIERS_CLASSIFICATIONS, new authorizations allow administrators to grant view-only access or restrict editing specifically to top-level classifications or user-assigned ('own') taxonomies.
- **Scheme-Specific Top-Level Editing:** Sub-authorizations enable granting top-level classification edit access on a per-scheme basis (e.g., AUTH_SUPPLIERS_TOP_LEVEL_CLASSIFICATION_EDIT_SCHEME1) alongside an EDIT_ALL permission.

- Rating & PDF Export Filtering: Users without permission to view specific classification categories will not see those categories in online supplier scorecard views or PDF export documents.
- Automatic Role Migration: Migration scripts update existing system roles holding edit permissions, granting them corresponding viewing and scheme-level editing permissions to preserve operational continuity.

User Interface, Security, and System Configuration

Quill HTML Editor Server Feedback and Validation Indicators

The Quill rich text editor now features dynamic validation feedback before form submission. The character counter and status icons visually reflect markup health:

- Valid Markup / Character Count: Displayed in standard black font when server validation passes.
- Validation Errors / Sanitization Rejection: Displayed in red font when character limits are exceeded or server markup sanitization rejects the HTML structure.
- Unknown Status: Displays an approximate length indicator while server evaluation is pending.

Unified Session Timeout and Alert Configuration

To simplify administration, session timeout thresholds can now be expanded up to 60 minutes (default remains 30 minutes). This setting and the pre-existing Session Timeout Alert are combined into a single unified configuration panel located at General > Warnings > Session timeout.

Client Secret Rotation with Graceful Rollover and Immediate Revocation

Client-credentials credentials can now be securely rotated without causing integration downtime:

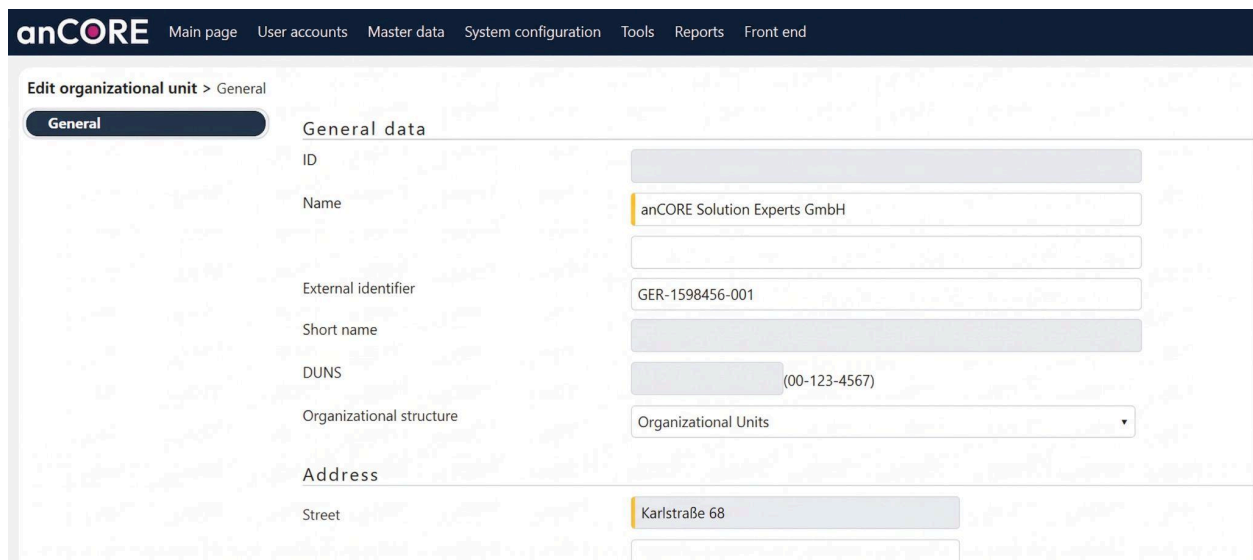
- Age Metrics & Security: UI displays exact timestamp and relative age breakdown (e.g., 'Created 2 months and 5 days ago') of active client secrets. Secret keys remain write-only and are never exposed in the UI.
- Graceful Rollover (72 Hours): Initiating a rotation creates a new secret while keeping the previous secret valid for 72 hours. Authentication requests using the old secret return a deprecation warning header/JSON metadata.
- Immediate Revocation: Triggering 'Force Immediate Revocation' instantly nullifies the previous secret, causing subsequent requests using the old key to fail immediately with an HTTP 401 (invalid_client) response.

OAuth v1 Session Timeout Configuration

Super Administrators can now configure session timeout durations for access tokens issued via `api/v1/oauth/token` using the `client_credentials` grant type, ensuring session stability during high-volume bulk API operations.

External Identifiers for Organizational Units

A new optional freetext field, 'External identifier', is available on Organizational Units within Back Office > Master data > Organizational units. This field allows external systems to track and manage organizational units using external cross-reference keys.



The screenshot shows the 'anCORE' application interface. At the top is a dark navigation bar with the logo and links: Main page, User accounts, Master data, System configuration, Tools, Reports, and Front end. Below this is a breadcrumb trail: 'Edit organizational unit > General'. The main content area is titled 'General data' and contains several input fields: 'ID' (disabled), 'Name' (containing 'anCORE Solution Experts GmbH'), 'External identifier' (containing 'GER-1598456-001'), 'Short name' (disabled), 'DUNS' (containing '(00-123-4567)'), 'Organizational structure' (a dropdown menu showing 'Organizational Units'), and 'Address' (containing 'Karlstraße 68').

Analytics Updates

Classification Entry Timestamps in Data Extractions

The data extraction schema for SRM Analytics has been expanded. The `dateOfEntry` field is now included in the `SupplierClassificationEntries` data model, making historical classification timestamps accessible via the Data Extractions API.

SupplierClassificationEntries

Data model for supplier classification entries which holds the values for the combination of classificationtaxonomyitemid and companyid.

islatest	boolean	
state	character varying(255)	
issuspended	boolean	
value	numeric(20,10)	
classificationschemeid	character(32)	<i>FK SupplierClassificationSchemes.classificationschemeid</i>
classificationtaxonomyitemid	character(32)	<i>FK TaxonomyClassifications.classificationitemid</i>
itemname	character varying(250)	
divisiontaxonomyitemid	character(32)	<i>FK TaxonomyDivisions.divisionitemid</i>
materialtaxonomyitemid	character(32)	<i>FK TaxonomyMaterials.materialitemid</i>
regiontaxonomyitemid	character(32)	<i>FK TaxonomyRegions.regionitemid</i>
companyid	character(32)	<i>FK Suppliers.companyid</i>

New Pre-Configured Analytics Dashboards

QAD SRM 7.0.0 introduces two standard pre-configured dashboards in the Analytics module to enhance operational visibility into material groups and certificate compliance. SuperAdmins and TenantAdmins are granted full view/edit permissions for the dashboards and linked data sources, while the Viewer Group is granted full view permissions by default.

- **Material Overview Dashboard:** Allows filtering by one or more material groups to display the TOP 10 suppliers by aggregated rating, total awarded volume, sourcing request award count and status, country/type supplier distribution, and monthly activity creation trends by type. Includes current-year object data alongside a complete active supplier snapshot.
- **Certificates Dashboard:** Provides multi-parameter filtering across material group, organization, and certificate types. Displays supplier counts, valid vs. planned certificate breakdown (pie chart), and an actionable task list identifying suppliers with expired certificates lacking a valid successor of the same type.

Note on Delivery Schedule: Scheduled for standard release distribution, these dashboard import packages are anticipated to be delivered with a slight delay by October 2026.

New and Enhanced APIs

Important API Note:

You can view all available API Documentation in Swagger directly from within QAD SRM.

Company v2 Search and Retrieval APIs

Version 7.0.0 introduces structured, integration-friendly v2 endpoints for company master data:

- GET /v2/companies: Queries company records using flexible search criteria, supporting top-level pagination, structured response envelopes, and optional verbose row-level metadata.
- GET /v2/companies/{id}: Retrieves detailed records for a single company using a standardized envelope structure (data and meta objects). Supports selective field filtering via the X-Requested-Fields header and row-level security metadata via X-Verbose: true.
- GET /v2/companies/query-properties: Exposes queryable company properties and supported operators for dynamic query building.
- Company Status Entries: Company v2 responses and export mapping models now include structured company status entry representations.

v1 Companies API Homepage Field Expansion

GET/POST/PUT /v1/companies: The GET, POST, and PUT operations for /v1/companies have been extended to include the optional 'homepage' attribute in company payloads. Minimal data endpoints (e.g., pre-registration) and reference-only representations are excluded from this change.

Bulk Fetch Company Taxonomies API

GET /v1/companies/taxonomies (Bulk): Enables consumers to fetch taxonomy entries (divisions, materials, regions) across multiple companies in a single call. Supports filtering by taxonomy item ID/number, rating scheme, or both, streamlining data retrieval prior to executing bulk PUT updates.

Taxonomy Tree Branch Operations API

GET/POST/PUT/DELETE /v1/taxonomyTree/divisions: Extended to support single-branch creation, modification, relocation, and deletion within division taxonomy trees. Interface consumers can perform targeted delta updates on tree nodes without downloading and re-uploading entire hierarchical structures.

Immediate Approval in Supplier Certificates API

POST /v1/supplierCertificates: Updated to allow passing approved=true directly upon certificate creation. This eliminates the need for a secondary PUT request to approve newly ingested certificates.

Custom Properties Payload Filtering

GET /v1/companies/{companyIdentifier}/customProperties: Enhanced with query parameter filtering options (such as custom property name or variable prefix). Integrations can request specific custom property subsets, drastically reducing payload sizes and execution times during synchronization tasks.

Organizational Units API Enhancements

/v1/organizationalUnits: Updated across GET, POST, PUT, and DELETE methods to expose the new externalIdentifier attribute. The external identifier can also be used as a key for resource lookup and deletion operations.

System Requirements & Supported Browsers

The QAD SRM Champion Assist interaction panel is fully integrated within the main application interface. Supported web browsers include current versions of Chrome, Safari, and Microsoft Edge.

Conclusion

QAD SRM 7.0.0 introduces new features and enhancements designed to optimize your supplier relationship management processes. We encourage you to explore these new capabilities and leverage them to drive greater efficiency and effectiveness in your organization.

Disclosure Statement: This documentation is intended to outline QAD's general product direction. It is intended for information purposes only. It is not a commitment to deliver any material, code, functional capabilities, and should not be relied upon in making purchasing decisions. The development, release, and timing of any features or functional capabilities described for QAD's products remains at the sole discretion of QAD.