Acumatica
The Cloud ERP

ERP System Evaluation Checklist

Selecting an ERP system to run your business is a daunting decision that will affect your company for many years. Many products offer the same or similar features, and it can be confusing to sort out what's essential and what's not. This checklist can help.

Acumatica Cloud ERP provides the best business management solution for transforming your company to thrive in the new digital economy. Built on a future-proof platform with open architecture for rapid integrations, scalability, and ease of use, Acumatica delivers unparalleled value to small and mid-market organizations. Connected Business. Delivered.



Use this checklist to compare the features and benefits of ERP vendors across these five categories:



PRODUCTIVITY
What can the product do to make you and your staff more productive?



FUNCTIONALITY
What features and functions does the product have that actually perform the daily accounting and business management functions?



TECHNOLOGY
Does the product leverage technology for mobility, usability, customizability, and maintainability?



VALUE
How does the product maximize features and functions vs. cost for the usable lifetime of the product?



RISK
How does the product minimize risk and facilitate security (both network and financial security)?

Category 1: Productivity

Feature	Benefit	Priority	Acumatica		
Intuitive	Easy to learn and use.		✓		
Work from anywhere	Access to system from any device, anytime, anywhere to facilitate staff working from home, late/weekend shifts, and field personnel.		✓		
Multi-language	Work in the language that best fits you. Print documents (like invoices) in the language of your customer.		✓		
Multi-currency	Work in any currency and convert as needed.		✓		
Workflow	Automate business processes, approvals, and notifications.		✓		
Wiki's	Share information and company documents among any combination of teams, departments, and external users.		✓		
Document management	Make documents accessible to all key personnel.		✓		
Single database	Single version of the truth. No need to maintain integrations between applications.		✓		
Better, quicker decisions and fewer mistakes	Comprehensive reporting to make informed decisions without the guesswork.		✓		



Category 2: Functionality

Feature	Benefit	Priority	Acumatica		
Multi-site	Support multi-company, multi-warehouse, and international companies, including financial consolidations, intercompany eliminations, and reconciliations.		✓		
Financial management	Support standard accounting functions, including General Ledger, Payroll, Cash Management, Tax management, Project Accounting, and more.		✓		
Quote-to-cash	Create quotes, convert to sales order, check inventory availability, run capable-to-promise (CTP), perform credit check, pick, pack, ship, invoice, and collect payment.		✓		
Procure-to-pay	Create requisitions, obtain approvals, convert to purchase order, receive inventory, receive invoice, match and pay.		✓		
Reporting	The system includes integrated reporting tools that allow data analysis while honoring global security settings. Reporting tools automatically include custom fields.		✓		
Industry support	Support specific industries including Services (Business and Field), Wholesale Distribution (Durable and Nondurable), Discrete Manufacturing (MTS, MTO, ETO, and Batch), eCommerce, Retail, and Construction.		✓		
Strong third-party software support to extend product functions	Access to library of enhancements available to extend the functionality of the product to meet your unique business needs.		✓		
CRM combined with ERP	Share a single database between ERP and CRM – no need to synchronize two databases with the same information.		✓		



Category 2: Functionality

Feature	Benefit	Priority	Acumatica		
Integrated Business Intelligence	Go beyond spreadsheets and use integrated BI and Analytics to understand what the financial and customer data is really telling you so you can make informed, actionable decisions.		✓		
Integrated eCommerce	Link online orders to your ERP and CRM. Track all sales, manage inventory in real time, collect the correct sales tax for multi-state sales, and more. Integrates with major eCommerce platforms, such as BigCommerce, Magento, and Shopify.		✓		



Category 3: Technology

Feature	Benefit	Priority	Acumatica		
True cloud	All functionality is accessible through the internet using a standard browser without the need for any software installation on the user's device. No additional software licensing required.		✓		
Responsive design	View and interact with every page of the application on any device with a minimum of resizing, panning, or scrolling.		✓		



Category 3: Technology

Feature	Benefit	Priority	Acumatica		
User interface	Modern look and feel. Customize screens and dashboards. Easy access to tasks with minimal clicks and intuitive workflow.		✓		
Mobile app	Equip office and field staff with easy-to-use functions on phones and tablets for routine transactions with barcode scanning for warehouse management, manufacturing, and field service.		✓		
Customizable and flexible	Ability to modify and customize business logic to meet your company's unique requirements.		✓		
Customization using industry standard tools	Perform customizations using industry standard tools and programming languages without requiring the use of proprietary languages or compilers.		✓		
Full relational database	All system data stored in a relational SQL database. Query data for reporting, BI, financial statements, audits, and more.		✓		
Database export	Access and export relational versions of all data for reporting, backup, and transfer.		✓		
Upgrade on your schedule	Ability to plan upgrades at dates and times that are convenient to you and your company – not the ERP vendor.		✓		
Artificial Intelligence	Streamline business processes with built-in machine learning, e.g., automatically entering expense report details from expense receipt photos.		✓		



Category 4: Value

Feature	Benefit	Priority	Acumatica		
Low Total Cost of Ownership (TCO)	Reduce the total cost of ownership over the foreseeable lifetime of the product (at a minimum 3-5 years), including licensing, support, hardware, upgrade, and hosting costs. Be sure to add the cost of additional products required to run the system (web server, eCommerce platform, database server, collaboration tools, CRM, etc.), which includes all required hardware, licensing, and support costs.		✓		
Scale as you grow	Ability to accommodate heavier volumes, more resources, and more users as your business grows. Pay only for what you use. Add more resources when you need them.		✓		
Flexible licensing options	Offers perpetual or subscription licensing (depreciable capital expense versus an ongoing operating expense).		✓		
Multiple deployment options	Deployment methods allow on premises in your facility, private cloud of your choice, or our public cloud using Amazon Web Services (AWS) or Microsoft Azure.		✓		
Preserve capital for other business initiatives	Cloud deployments reduce the need for initial cash outlay for hardware and software purchases. Cloud deployments reduce the amount of internal IT staff required for hardware and software support and maintenance.		✓		
Charged by resources used, not by user	The value of an ERP system is directly related to the number of people who use it. By involving everybody (including customers and vendors), businesses can digitally transform.		✓		

Category 5: Risk

Feature	Benefit	Priority	Acumatica		
Predictable monthly costs	Not vulnerable to spikes in IT costs. Standardizing on a platform allows you to predict your monthly cost for the system.		✓		
Deploy quickly	Eliminate time delay and risk of unplanned costs by deploying quickly with a cloud solution.		✓		
Leverage global technology leaders	Ability to utilize the resources of cloud hosting leaders (Amazon and Microsoft) for their fast response and uptime.		✓		
Knowledge of your industry	Reduce risk by using a software vendor with the solutions and knowledge for your specific industry.		✓		
Customer references	Cites customer successes using their software in your industry, including independent customer satisfaction metrics.		✓		
Best-in-class security at no additional cost	Support platform, web, and computer security leveraging expertise at hosting providers.		✓		
Data in the cloud	System leverages data security from AWS and Microsoft Azure. Data kept on your servers are more vulnerable to attack.		✓		
Backup and disaster recovery	Prepared for the worst – cloud deployment lowers costs for backup, failover, and disaster recovery.		✓		
Simpler integration with other web apps	Utilize web capabilities to integrate with other web-based business applications.		✓		
Vendor handles updates and upgrades	Eliminate risk of missing an upgrade with a cloud solution.		✓		