ERP SOFTWARE
SELECTION CHECKLIST

A straightforward guide to selecting a new ERP system

REPORT HIGHLIGHTS

- Building your ERP software selection criteria.
- A look at some common vendor questions.
- Considerations such as integrations and deployment.

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GETTING STARTED

SELECTING YOUR NEW ERP SOLUTION

Considering the investment required to implement an enterprise resource planning (ERP) solution, the process of selecting the right vendor is not a decision to be made lightly. ERP software is a solution that touches on almost every aspect of a business, from HR to Sales to Distribution, and everywhere in between. Knowing exactly what you need and what you don’t can be challenging and often times overwhelming.

That's why we developed a comprehensive ERP Selection Checklist for your perusal. Feel free to utilize this tool when in the process of choosing an ERP vendor with all the features and offerings you’re looking for.

Additionally, qualifying ERP vendors by asking them constructive questions can be instrumental in helping you to determine which software solution is the best fit for your company. We've included some Frequently Asked Questions commonly received from prospects and customers to help make your selection process a little easier.
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A modern, robust ERP system can gather financial data and generate reports based on that information. In some cases, it can do much more. If your company has a need for a financial module integration with your ERP system, consider the following features.

- Accounts Payable
- Accounts Receivable
- Automatic Cost Calculation
- Bank Reconciliation
- Budgeting & Cash Management
- Cost Analysis
- Cost Calculation Mode Selection
- Credit Card Gateway
- Deposits
- ERP to Bank Interfaces
- Expense Management
- Fixed Assets
- General Ledger
- Invoicing/Billing
- Job Cost
- Multiple Currencies Support
- Multiple Languages Support
- Payroll
- Regulatory Compliance Support
- Advanced/Recurring Allocations

**VENDOR FAQ**

What types of integration does your ERP solution offer when it comes to accounting and finance?

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HUMAN RESOURCES

PROTECT YOUR MOST VALUABLE ASSET - YOUR PEOPLE

While it might not be one of your company’s main considerations in selecting a new ERP solution, HR features housed within enterprise resource planning software can create a more lean, efficient business.

If you have a need for HR-related functionality in your ERP, inquire with potential vendors about the following key features.

- Employee Performance Management
- Employee Self Service
- Enterprise Compensation Management
- Manager Self Service
- Payroll Integration
- Personal Income Tax
- Talent Management
- Time and Labor/Attendance
- Time Card Management
- Human Resource Management

VENDOR FAQ
Can I get my HR-related software integrated or able to interact with your ERP solution?
ENGINEERING

MAINTAIN ENGINEERING DATA

The backbone of any enterprise resource planning system: engineering.

You’ll want to ask any and all potential ERP vendors how their solution differs from competitors when it comes to their engineering features, like production cost analysis or quality monitoring.

**VENDOR FAQ**

How does your software provide better visibility into my engineering processes as a manager?

**ERP SOFTWARE SELECTION CHECKLIST**

- Engineering Change Management
- Forecasting
- Job Costing
- Process Synchronization
- Product Data Management
- Production Control
- Production Cost Analysis
- Quality Analysis
- Quality Assurance Management
- Quality Monitoring
- Resource Planning
- Resource Management
Controlling the flow of materials through your manufacturing or distribution facility is crucial. As such, having an ERP solution with built-in features targeted at handling and managing materials is a must.

Below are some major features and modules to consider when comparing/contrasting ERP solutions.

- Inventory
- Material Requirements Planning
- Mobile Data Collection
- Material Control Management
- Purchasing
- Requisitions
- UPS/FedEx Shipping Integration
- Multi-Carrier Shipment Processing

**VENDOR FAQ**

Does your ERP solution take into account regulatory compliance?
Production planning assists companies with the utilization of their resources. This type of functionality is at the heart of an enterprise resource planning solution, and should be a major consideration for your business.

Specifically, consider the ways in which the ERP vendor places value in lean/Kanban and other efficiency-centric methodologies.

- Capacity Requirements Planning
- Collection of Production Data
- Shop Floor Control
- Visual Scheduling
- Dispatch & Reporting
- Lean/Kanban
- Equipment Maintenance
- Quality Management

**VENDOR FAQ**

In what ways does your ERP solution foster a lean manufacturing and distribution environment?
ERP software allows manufacturers and distributors the ability to gain increased visibility into their supply chain, as well as stronger supply chain management.

From demand planning to scheduling and sourcing, what supply chain-related features does your business need to thrive?

- Demand Planning
- Distribution Management
- Event Management
- Execution of Orders
- Forecasting
- Logistics Management
- Logistics Planning
- Management of Resources
- Back Office Integrations
- Procurement
- Production Performance Analysis
- Sourcing

VENDOR FAQ
How often do you release new product versions, and how many of your customers are on the most current solution?
INTEGRATIONS
SYNC UP YOUR SOFTWARE SOLUTIONS

If you’re using other major software solutions, it’s important to find out from any potential ERP vendors whether they have integrations available. For example, a lot of ERP solutions can integrate with your CAD software or CRM software.

Having fully-integrated software can make the difference between your business running efficiently or not at all.

- CAD Integration
- CRM Integration
- eCommerce Integration
- EDI Integration
- Hardware Integration
- Integration with Fax Server
- Integration with Barcode Generator
- Integration with Portable Scanners
- Integration with Mobile
- Integration with Accounting Software

VENDOR FAQ
Are you currently in the process of looking for new businesses and offerings to integrate with?
SUPPORT

GET HELP WHEN YOU NEED IT

ERP software is a major investment, and you should expect your vendor to support your implementation and ongoing software usage. It's also relatively common to have unforeseen challenges arise, or for questions to pop up.

A software vendor's support team and resources should be there for you and it's critical to find out about what they offer (and don't offer) before signing.

- ✔ Chat/IM
- ✔ Email
- ✔ Forum/Community Support
- ✔ Helpdesk Support
- ✔ Local/Live Support
- ✔ Support Hours
- ✔ Maintenance
- ✔ Phone

VENDOR FAQ

Can you provide me with examples of your user documentation?
DEPLOYMENT

DEPLOY YOUR SOLUTION YOUR WAY

Increasingly, ERP vendors have begun developing alternative deployment solutions to the traditional on-premise offering.

One type of deployment may be the perfect fit for your business, while the other one, not so much. Be sure to find out what deployment options they offer, as well as which one is the best fit for your business.

- **Cloud ERP**
  ERP is hosted in a cloud environment, without hardware infrastructure or maintenance requirements.

- **On-Premise ERP**
  A traditional ERP deployment, on-premise is housed and managed by a business’s IT department.

- **Mixed Deployment**
  Depends on the vendor, but part of the solution may be in the cloud and part on-premise.

**VENDOR FAQ**

How is your ERP software pricing structured, and what type of deployment options do you offer?
TRAINING

GAIN KNOWLEDGE & LEARN NEW SKILLS

ERP vendors need to have resources and training opportunities available to your business. Whether you're planning on bringing on new employees, or you simply need to stay up-to-date on all of the latest and greatest features of your ERP, training and resources are indispensable.

Consider some of the following training offerings and choose which may be most valuable to your organization.

- Customer Conference
- Customer Website Forum
- Educational Webinars
- Free Demo
- Free Trial
- Online Documentation
- Online Workshops
- On-Site User Training
- User Group Meetings
- User Training Classes
- Video Library
- Interactive Training Tools

VENDOR FAQ

Does the ERP system facilitate change management in its design?

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For some companies, having an integrated customer relationship management (CRM) solution is an absolute must. After all, CRM software provides automation and influential tools which help out in the areas of sales, marketing, and customer service.

Here are some of the features to look for in a CRM solution.

- Contact Management
- Contact Center
- Defect Tracking
- Document Management
- Email Marketing
- Incident Escalation/Tracking
- Landing Page Integration
- Lead Qualification & Scoring
- Mobile Access
- Social CRM
- Workflow Automation
- Campaign Management
- Pipeline Management
- Quotation Management

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