

Top ERP Requirements Checklist

This requirements checklist is designed to help you assess whether ERP systems and features support your business needs.

Accounting & Financials

Includes all the core accounting and compliance systems.

- ✓ General ledger
- ✓ Accounts receivable
- ✓ Accounts payable
- ✓ Billing
- ✓ Revenue recognition
- ✓ Budgeting
- ✓ Financial reporting

Human Capital Management

Centralizes all human resource information for managers, HR staff and for employees.

- ✓ Central repository for employee data
- ✓ Onboarding
- ✓ Benefits
- ✓ Payroll
- ✓ Taxes
- ✓ Timecard tracking
- ✓ Time off requests

Manufacturing & Distribution

Enables you to run all facets of your manufacturing operations with end-to-end visibility and analysis.

- ✓ Production control
- ✓ Distribution scheduling
- ✓ Quality analysis
- ✓ Order tracking

Materials Management

Streamlines the procure-to-pay process with visibility into current and predicted stock levels.

- ✓ Automated procurement
- ✓ Matching purchase orders
- ✓ Stock optimization

Sales and Inventory Management

Automates your order-to-cash process and links to inventory management.

- ✓ Ecommerce
- ✓ Pricing management
- ✓ Order entry
- ✓ Returns
- ✓ Cycle counting
- ✓ Inventory tracking
- ✓ Warehousing

Supply Chain Management

Automates and integrates all the steps between ordering product from a vendor and getting finished goods to a customer.

- ✓ Demand forecasting
- ✓ Purchase orders
- ✓ Transfer orders
- ✓ Work orders
- ✓ Global coordination
- ✓ Warranty management

Customer Relationship Management

Centralizes, tracks and optimizes all contact with customers.

- ✓ Central repository for customer data
- ✓ Order history
- ✓ Marketing promotions
- ✓ Lead management
- ✓ Quotes

Business Intelligence & Reporting

A layer of cross-functional analysis and reporting tools.

- ✓ Dashboards
- ✓ Analytics
- ✓ Multi-layer reporting
- ✓ Scheduled/subscribed reports
- ✓ Custom reports