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

**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

**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

**Customer Relationship Management**
Centralizes, tracks and optimizes all contact with customers.
- Central repository for customer data
- Order history
- Marketing promotions
- Lead management
- Quotes

**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

**Materials Management**
Streamlines the procure-to-pay process with visibility into current and predicted stock levels.
- Automated procurement
- Matching purchase orders
- Stock optimization

**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

**Business Intelligence & Reporting**
A layer of cross-functional analysis and reporting tools.
- Dashboards
- Analytics
- Multi-layer reporting
- Scheduled/subscribed reports
- Custom reports