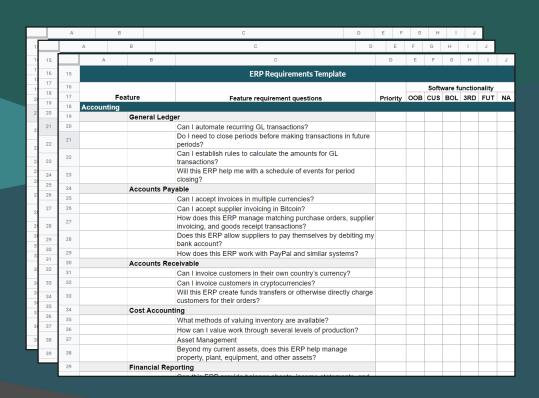


ERP Requirements Template

Your complete ERP requirements feature list

- Over 200 requirements included
- Evaluate vendor responses in a quantitative way
- Detailed ERP requirements gathering including functionality questions





ERP Requirements Template

ERP Requirements Template

				Software functionality				Software functionality key		
Feature	Feature requirement questions	Priority	оов	cus	BOL	3RD F	UT N.	Α	Notes	OOB = Out-of-the-Box
Accounting	Accounting									CUS = Available through customization
General Ledg	er									BOL = Bolt-on at additional cost
	Can I automate recurring GL transactions?									3RD = Available through integration with 3rd-party software
	Do I need to close periods before making transactions in future periods?									FUT = In development for future release
	Can I establish rules to calculate the amounts for GL transactions?									NA = Not available
	Will this ERP help me with a schedule of events for period closing?									The notes section is for additional information such as software integrations, and system requirements for integrations
Accounts Pay	yable									
	Can I accept invoices in multiple currencies?									ERP FOCUS
	Can I accept supplier invoicing in Bitcoin?									ERPFUCUS
	How does this ERP manage matching purchase orders, supplier invoicing, and goods receipt transactions?									
	Does this ERP allow suppliers to pay themselves by debiting my bank account?									ERPfocus.com gathers together the latest thinking and research about ERP software. Whether you're new to the
	Does this ERP work with PayPal and similar systems?									world of ERP or an industry veteran, you'll find exclusive articles, white papers and downloads designed to help you
Accounts Rec	ceivable									expand your expertise.
	Can I invoice customers in their own country's currency?									
	Can I invoice customers in cryptocurrencies?									
	Will this ERP create funds transfers or otherwise directly charge customers for their orders?									
Cost Account	ting									
	What methods of valuing inventory are available?									
	Can I value work through several levels of production?									
	Asset Management									
	Beyond my current assets, does this ERP help manage property, plant, equipment, and other assets?									
Financial Rep	porting									
	Can this ERP provide balance sheets, income statements, and cash flow reports that meet the requirements of different countries?									
	Many government and regulatory authorities have specified reporting formats, how will this ERP meet those requirements?									

	Davinall				
	Payroll				
		Can I use different tax rates for states and countries?			
		Is there any integrated time and attendance tracking?			
	Taxes				
	Cash Manage	ment			
Sales					
	Inside Sales				
		How does this ERP allow me to establish sales territories?			
		Can I review and analyze sales transactions online?			
	Outside Sales				
		Does the ERP manage multi-tiered orders?			
		Are quotes kept in a database and transferred upon a sale?			
		Can I modify those quotes?			
		Do I have multiple views of the sales backlog?			
	Web Sales	Do i mara manapia none di ana danaa badinagi.			
	Web Gales	Does my web storefront integrate with ERP?			
	Customer Ma				
	Justomer Ma	What data can I keep in my customer database?			
		Can I maintain customer credit limits?			
		Can I maintain customer credit limits? Can I manage my sales pipeline?			
		9 ,			
		What prospecting management is included?			
		What social media can I integrate with?			
	Customer Ret				
		Can I process customer returns?			
		Do I have options for receiving or not receiving returns into inventory?			
	Sales Pipeline				
		Are tools are included in this ERP to help manage my sales pipeline?			
	Prospecting				
		Does this ERP manage my prospecting efforts?			
		Can I keep prospects' and suspects' records within my customer database?			
	Forecasting				
		Can I determine what are forecasts kept? By customer? By			
		products? By product lines? Other?			
		Is there capability to use historical trends to develop statistical forecasts?			
		Can I use outside statistics to improve forecasts?			
Marketing					
	Product Mana	gement			
		Are product management tools are included in this ERP?			
	Customer Dev	velopment			
	Advertising				
		Are automated marketing capabilities are included?			
Legal					
	Patents				
	Contracts				
	Government I	Regulations			
Purchasing			 		
	Purchase Ord				
		Are there ERP tools to ensure purchase orders are properly authorized?			
	Supplier Mana				
		Can this ERP help me assess suppliers' ability to deliver future			
		orders?			
	Product Rece	iving			
Inventory					
	Retail Invento	ry			

		Some inventory is in showrooms, are there tools to manage those					
		items?					
	Stockroom						
		Can I class certain items or locations as nettable or non-nettable?					
		Does this ERP support categories of inventory such as in-process or finished goods?					
		Can I manage turnover by various subsets of inventory?					
		Are there reports and dashboards available to manage surplus inventory?					
	Surplus	•					
	•	Can I define what is surplus inventory and use built-in ERP tools?					
	Management	·					
	Location						
		Can I decide what limits the ERP holds regarding stocking locations?					
		Can I define certain locations with qualities such as freezers, heavy weights, and other qualities I want to use?					
	Value						
		Can I use alternative valuations?					
		If I write off some inventory but still keep it in stock, will the system allow zero-dollar valuations?					
		What controls are available to prevent negative inventory?					
	Slotting	to provide a second of the sec					
	Supplier Cons	signed					
		Can I manage inventory supplied as consigned by my vendors?					
	Customer Cor	nsigned					
		Can I manage inventory supplied by my customer as consigned?					
	External Cons						
		Can I manage my inventory that is located off-site, perhaps at a customer site?					
Manufacturii	ng						
	Make to Order	•					
	Make to Stock						
	Engineer to O	rder					
Engineering							
	Product Mana				_		
		Can I track all aspects of a product from design through release and all revisions until the product is obsolete?					
	Component M						
		Does the ERP track and control the design of manufactured and purchased components through every revision?					
	Production Ro						
		Can we establish a production routing for every product from the first movement of components out of the stock room until the					
		product is complete? Can we manage alternate routings that meet all our quality and					
		compliance requirements but serve when we find real-time modifications due to any need?					
	Alternate Man	•					
		Can this ERP keep an approved set of alternate components we could use when there are supply chain shortages?					
	Change Mana	117					
		Does this ERP help us manage change within the organization? These needs are particularly related to people anywhere in the					
		business who need help adapting to change as the business evolves.					
Quality						<u> </u>	
- Launty	Monitor Produ	uction					
		Does the ERP help schedule inspections so that production can move at a schedule needed to meet customer expectations?					
	Customer Red	quirement Compliance					
	Justonie itel	Tamenina Somphanoo		$\overline{}$	 _		

		Does the ERP allow us to document every customer requirement			
		and expectation so that we can establish controls that ensure			
		complete customer satisfaction?			
	Legal and Go	vernmental Compliance			
		Does the ERP allow us to document governmental and non-			
		governmental compliance requirements and requests so that we can establish controls that ensure those compliances are met?			
	Supplier Com				
	Supplier Com	Does the ERP allow us to document any requirements we place			
		on our suppliers allowing us to establish needed controls?			
	Corrections	on our suppliers unowing us to establish needed sontiols.			
	Corrections	Does the ERP include tools to document corrective actions and			
		our progress toward meeting those corrective actions?			
Human Res	ources	, , , , , , , , , , , , , , , , , , , ,			
	Hiring				
	9	Is there an onboarding system included?			
		Can I track candidates for a position?			
	Employee Pro				
	Linployee Pro				
	Erinas Dan C	Can I use this ERP to manage employee performance?			
	Fringe Benefi				
		Can I manage employee benefits that vary by location and employee classification?			
	Employee Re				
	Linployee Re	Does this ERP track disciplinary actions?			
		Does this ERP track disciplinary actions?			
	Training	MILLION EDD			
		Will this ERP record training and certifications?			
		Can I use that training and certification to ensure the right person is assigned to certain tasks?			
Software		is assigned to certain tasks?			
Software	Product Deve	lanmant			
		•			
	Project Manag				
	Product Time	lines		ļ.	
Information	Technology				
	Servers				
	Internet				
	User Systems				
		Can users self-manage their systems?			
		Is there capability to manage and track users?			
	Data Managei	ment			
	User Software	Management			
	Email System				
		Does this ERP integrate with my email system?			
		Are there additional notifications I can get beyond email?			
	Phone System	9 ,			
	Systems Integ				
		Are there APIs are available?			
		Can I develop new APIs?			
		Are there requirements to integrate measurement tools with this			
		ERP?			
		Are barcode symbologies are supported? (If so, what are they?)			
		Can the ERP be integrated with other systems within the business? (If so, what are the requirements)			
		Are there limits to ERP data I can read or write from other systems? (If so, what are they?)			
		OYOGOTIO. (II OO, WHAL AIC LICY: /			
	Support Ticks				
	Support Ticke	ets			
	Support Ticke	cts Can I use my existing chat system to support ERP?			
Logistics	Support Ticks	ets			
Logistics		Can I use my existing chat system to support ERP? Are support records included with this ERP?			
Logistics	Support Ticke Supply Chain	Can I use my existing chat system to support ERP? Are support records included with this ERP?			

Can I receive adva so, what is the pro	nce shipping notifications from suppliers? (If cess)			
Can I link to carrie	websites for real-time tracking?			
Can I make appoir scheduling?	tments for dock time and equipment			
Transportation				
Will this ERP help	me with fleet management?			
Does this ERP hel	give me GPS position of my fleet?			
Can I get real-time synchronization?	mobile access with automatic			
Will this ERP help	me with route planning and optimization?			
Warehouse	· • •			
Is there automated	slotting in this ERP?			
Does this ERP prid	oritize orders?			
Can I use my picki	ng priorities or does the system create a plan?			
Does this ERP hel	p me with labor scheduling?			
	edule cross-docking transactions?			
Does this ERP hel	p me manage carton packing?			
Can I use RFID te	chnologies? (If so, what are they?)			
Mobile platform				
Native iOS applica	tion?			
Native Android app	olication?			
Native Windows p	none application?			
Mobile web application	ation?			
Smartwatch iOS a	oplication?			
Smartwatch Andro	id application?			
Delivery platform				
Is this ERP availab	le in the cloud or on my premises?			
	arty to host my cloud platform or must I use			
Are there hybrid pl	atforms are available?			

ERP Requirements Template

This guide was written by Tom Miller, ERP Focus Columnist, with contributions from Megan Meade, ERP Focus Editors.

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