

ERP Requirements Checklist for SMEs

Use this checklist to define the functional requirements for your ERP evaluation. The features and functionality you need will be driven by your business processes and your ERP project objectives. Starting your search for a new ERP system knowing what your requirements are will help you narrow the options and evaluate which solution is best-fit for your business.

Sales & Customer Relationship Management (CRM)

Y/N	Functionality
	Sales quotes / estimates
	Sales order processing
	Sales order management
	Sales opportunity / pipeline management
	Sales forecasting
	Sales pipeline reporting
	Credit card processing
	Customer account management
	Customer account dashboard
	Contact management
	eCommerce
	Email integration

Notes

Purchasing

Y/N	Functionality
	Purchase quotes
	Purchase orders
	Goods receipts
	Multiple units of measure
	Item price lists
	Product bar codes
	Material requirements planning (MRP)
	Return material authorization (RMA)
	Pricing reports
	Last purchase price
	Purchasing reports
	Vendor payment terms
	Vendor management
	Vendor electronic data interchange (EDI)

Notes

Inventory & Warehouse

Y/N	Functionality
	Multiple warehouses
	Multiple inventory cost methods
	Available-to-promise check
	Multiple units of measure
	Multiple item prices
	Bin location management
	Inventory movement tracking (in/out/transfer)
	Drop shipping
	Pick and pack
	Inventory and cycle counts
	Item reports
	Inventory valuation reports

Notes

Job / Project Management

Y/N	Functionality
	Job costing
	Estimates
	Contract management
	Resource management
	Scheduling
	Dispatch
	Time & expense
	Materials management
	Equipment rentals
	Project planning
	Resource capacity planning
	GANTT charts
	Job / project budgeting
	Job / project reporting

Notes

Production

Y/N	Functionality
	Production cost analysis
	Product data management
	Forecasting
	Resource planning & management
	Multi-level bill of materials (BOM)
	Bulk production orders
	Production control
	Master production scheduling
	Capacity requirements planning

Notes

Accounting

Y/N	Functionality
	Accounts receivable
	Accounts payable
	Deposits & incoming payments
	Budgeting
	Bank reconciliation
	Cash flow management
	Automatic cost calculation
	Advanced allocations
	Expense management
	General ledger
	Fixed assets
	Payroll

Notes

Human Resources

Y/N	Functionality
	Human resource management
	Employee performance management
	Benefits administration
	Payroll integration & management
	Income tax administration
	Employee self-service

Notes

Support

Y/N	Functionality
	Training services
	Maintenance & upgrades
	Phone support
	Email support
	Chat / IM support
	Help desk support
	Forum / community support

Notes

Other Requirements

Y/N	Functionality
	Multi-language
	Multi-branch
	Multiple currencies
	Multiple company support
	Intercompany transactions
	Document audit trails
	Application & software integration
	Support for mobile devices
	Integration with portable scanners
	On-premise deployment
	Cloud - public deployment
	Cloud - private deployment

Notes