Acumatica
The Cloud ERP

Retail and eCommerce Back-Office System Evaluation Checklist

The back-office system you select today will affect how your eCommerce business runs for the next 5 to 10 years. Often referred to as an Enterprise Resource Planning (ERP) system, you'll want to select a system that works seamlessly with your eCommerce website. This checklist can help you compare the ERP features you need for your organization.

Use this checklist to compare features and benefits across five important categories:

PRODUCTIVITY
What can the back-office product do to make you and your staff more productive?

FUNCTIONALITY
What features and functions does the product have that can perform your daily accounting and business management functions?
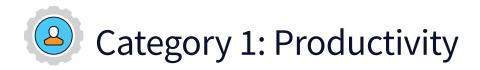
TECHNOLOGY
Does the product leverage the best technology for usability, customizability, and maintainability?

VALUE
How will the product maximize features and functions versus cost for the usable lifetime of the product?

RISK
How does the product minimize risk and facilitate both network and financial security?

Category 1: Productivity

Feature	Benefit	Priority	Acumatica		
Ability to integrate with popular eCommerce platforms	Leverage the platform for access to customer, inventory, sales, and shipping data on your eCommerce website. Reduce redundant manual data entry and errors. Gain an accurate picture of inventory across channels. Automatically notify customers when orders ship.		✓		
Intuitive	Easy to learn and use.		✓		
True universal availability	Access the system from any device, anytime, anywhere. Support employees working in the field, from home, or on late or weekend shifts.		✓		
Multilingual	Work in the language of your choice. Print customer-facing documents (such as invoices) in the language of your customer.		✓		
Multicurrency	Operate in any currency and convert as needed.		✓		
Workflow	Automate business processes, approvals, and notifications.		✓		
Wiki's	Share information and company documents among any combination of teams, departments, and external users.		✓		
Single database	Establish a single version of the truth. Eliminate the need to maintain integrations between applications.		✓		
Comprehensive reporting	Make faster, better decisions with fewer mistakes. Eliminate guesswork.		✓		

Category 2: Functionality

Feature	Benefit	Priority	Acumatica		
Multi-entity	Support multi-company, multi-warehouse, and international organizations. Perform financial consolidations, intercompany eliminations, and reconciliations.		✓		
Financial management	Perform standard accounting functions, including general ledger, accounts payable, accounts receivable, cash management, and tax management.		✓		
Quote-to-cash	Generate quotes, convert to sales orders, check inventory availability, perform credit checks, pick, ship, invoice, and collect payments.		✓		
Procure-to-pay	Create requisitions, obtain approvals, convert to purchase orders, receive inventory, receive invoices, and match and pay.		✓		
Retail operations	Deploy innovative pricing offers and promotions, launch loyalty programs, capture POS transactions, and build brand loyalty with your customer base.		✓		
Strong third-party software support to extend product functions	Access a library of enhancements that extend the functionality of the product to meet your unique business needs.		✓		
CRM combined with ERP	Share a single database between ERP and CRM – no need to synchronize two databases with the same information.		✓		
Integrated business intelligence	Go beyond spreadsheets and use integrated BI to understand what the financial and customer data is really telling you. Make informed, actionable decisions.		✓		

Category 2: Functionality *(Continued)*

Feature	Benefit	Priority	▲ Acumatica		
Integrated eCommerce	Link online orders to your ERP and CRM. Track all sales, manage inventory in real time, and collect the correct sales tax for multi-state sales.		✓		

Category 3: Technology

Feature	Benefit	Priority	▲ Acumatica		
Synchronization with your eCommerce website	Reduce order processing costs and boost your bottom line. Automatically exchange category metadata, categories, product metadata, products, product pricing and inventory, product images, customers, orders, order status, and shipping information between systems.		✓		
True cloud	Access all functionality through the internet using a standard browser, without the need to install any software on the user's device. No additional software installation required.		✓		

Category 3: Technology *(Continued)*

Feature	Benefit	Priority	Acumatica		
Responsive design	View and interact with every page of the application on any device with minimal resizing, panning, or scrolling.		✓		
Customizable and flexible	Modify and customize business logic to meet your company's unique requirements.		✓		
User interface	Give your users a modern look and feel. Customize screens and dashboards. Gain easy access to business tasks with minimal clicks and an intuitive workflow.		✓		
Customization using industry-standard tools	Perform customizations using industry-standard tools and programming languages. Avoid the need to use proprietary languages or compilers.		✓		
Full relational database	Store all system data in a relational SQL database. Query data for reporting, BI, financial statements, and audits.		✓		
Database export	Access and export relational versions of all data for reporting, backup, and transfer.		✓		
Upgrade on your schedule	Plan upgrades at dates and times that are convenient for you and your company – not just the software vendor.		✓		
Capable of moving to the cloud when you are ready	Deploy the product in the cloud or on premises – whichever best meets your needs at the time. Switch deployment models any time it makes sense for your business.		✓		

Category 4: Value

Feature	Benefit	Priority	Acumatica		
Low Total Cost of Ownership (TCO)	Reduce the total cost of ownership over the foreseeable lifetime of the product (at least 3-5 years), including licensing, support, hardware, upgrade, and hosting costs. Be sure to add the cost of additional products required to run the system (such as web server, database server, collaboration tools, and CRM), and include hardware, licensing, and support costs.		✓		
Scale as you grow	Accommodate heavier volumes, more resources, and more users as your business grows. Pay only for what you use. Add more resources when you need them.		✓		
Multiple deployment options	Choose between deploying in a public cloud using Amazon Web Services (AWS), in a private cloud of your choice, or on premises in your facility.		✓		
Flexible licensing options	Choose between subscription or perpetual licensing (ongoing operating expense versus a depreciable capital expense).		✓		
Preserve capital for other business initiatives	Deploy in the cloud to reduce the initial cash outlay for hardware and software purchases. Cloud deployments reduce the amount of internal IT staff required for hardware and software support and maintenance.		✓		
Charged by resources used, not by user	Pay only for the resources you use, not for the number of users. Make the benefits of ERP available to all employees companywide. Charging by user penalizes growing businesses.		✓		

Category 5: Risk

Feature	Benefit	Priority	Acumatica		
Predictable monthly costs	Avoid spikes in IT costs. Standardizing on a platform allows you to predict your monthly cost for the system.		✔		
Deploy quickly	Eliminate time delay and risk of unplanned costs by deploying quickly with a cloud solution.		✔		
Leverage global technology leaders	Use the resources of cloud hosting leaders (such as Amazon, Microsoft, and IBM) to get fast response and uptime.		✔		
Customer references	Choose a vendor that can cite eCommerce customer successes with their software.		✔		
Best-in-class security at no additional cost	Support platform, web, and computer security leveraging expertise at hosting providers.		✔		
Data in the cloud	Avoid leaving your data on your own servers where it is more vulnerable to attack.		✔		
Backup and disaster recovery	Prepare for the worst – cloud deployment lowers costs for backup, failover, and disaster recovery.		✔		
Simpler integration with other web apps	Use web capabilities to integrate with other web-based business applications.		✔		
Vendor handles updates and upgrades	Eliminate the risk of missing an upgrade by choosing a cloud solution that's continually updated.		✔		

Acumatica
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Acumatica Cloud ERP is a comprehensive business management solution that was born in the cloud and built for more connected, collaborative ways of working. Designed explicitly to enable small and mid-market companies to thrive in today's digital economy, Acumatica's flexible solution, customer-friendly business practices, and industry-specific functionality help growing businesses adapt to fast-moving markets and take control of their future.

For more information on Acumatica, visit www.acumatica.com or follow us on LinkedIn.

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