

# 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