

Distribution ERP System Evaluation Checklist

Choosing the right Distribution ERP platform is a decision that will shape your company's future. With many products offering similar features, it can be challenging to determine what truly matters for your business.

This interactive checklist helps you compare features and benefits across five critical categories. Use it to evaluate which solution will help you build a more connected, collaborative, and profitable business.

Use this checklist to compare the features and benefits of ERP vendors across these five categories:



Productivity

What can the product do to make you and your staff more productive?



Functionality

What features and functions does the product have that actually perform the daily accounting and business management functions?



Technology

Does the product leverage technology for mobility, usability, customizability, and maintainability?



Value

How does the product maximize features and functions vs. cost for the usable lifetime of the product?



Risk

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

Productivity

Feature	Benefit	Priority	Acumatica		
Intuitive, Modern User Interface	Shorten the learning curve and help users navigate tasks quickly with software that is easy to learn and use. Expedite adoption rates with an attractive, modern interface.		✓		
Comprehensive Modules	Manages all work in a single, connected application. Unite back-office, front-office, warehouse, and sales operations to streamline processes and maintain one version of the truth.		✓		
Role-Based Access & Personalization	Empower every user by tailoring menus, screens, and data access to meet their specific needs. Ensures team members see what they need to work effectively.		✓		
True Mobility for Shop Floor & Office	Enable your team to access the system and critical data anytime, anywhere, on any device. Keep shipments moving forward, whether on the loading dock, in the warehouse, or in the office.		✓		
Intelligent Task Automation	Automate routine tasks, such as data imports, report delivery, and email notifications. Reduce manual effort to free up time for high-value activities that drive sales and service.		✓		
Comprehensive Reporting & Insights	Support faster, better decision-making with real-time, comprehensive data regarding inventory levels, margins, and sales trends.		✓		
Unified Document Management	Ensure that critical distribution documents, such as quotes, orders, pick tickets, bills of lading, and invoices, are up to date and available to all key personnel to improve collaboration.		✓		
Free Online Help and Support	Gets your team up and running quickly with accessible, in-depth online help resources and free training content designed to answer questions and accelerate user adoption.		✓		
Multilingual Support	Empower your team to operate across borders by working in their preferred language. Print documents in the language of your customer or supplier.		✓		

Functionality

Feature	Benefit	Priority	Acumatica		
Comprehensive Distribution Management	Manage your entire supply chain in a single system, including leads, opportunities, sales orders, commerce storefronts, inventory, demand planning, purchasing, warehouse management, shipping, and financials to ensure accurate, on-time fulfillment.		✓		
Advanced Inventory Control	Minimize carrying costs and stockouts with real-time tracking, replenishment automation, matrix items, and lot/serial traceability across multiple locations.		✓		
Warehouse Management System (WMS)	Streamline fulfillment with an embedded WMS system that supports paperless picking, batch and wave picking, barcode scanning, and automated shipping to reduce errors and improve fill rates.		✓		
Omnichannel Sales Management	Unify all sales channels by seamlessly connecting counter sales, Amazon Marketplace listings, and B2B/B2C commerce storefronts into a single cohesive backend system.		✓		
Automated Procurement	Optimize purchasing with time-phased distribution requirements planning and automated requisition workflows that generate orders based on stock levels and demand forecasts.		✓		
Embedded CRM	Use a single database to manage the full customer lifecycle, from lead to invoice, enabling sales and support teams to strengthen relationships, eliminate data silos, and streamline self-service, case management, marketing, and sales automation.		✓		
Counter and Will-Call Sales	Process face-to-face counter and will-call sales transactions efficiently with connected POS capabilities that manage sales, returns, and exchanges with real-time inventory and connections to retail hardware, including cash registers, receipt printers, barcode scanners, and credit card terminals.		✓		
Intelligent Order Management	Accelerate order processing with automated workflows, AI-powered up-sell, and item suggestions for cross-sell and item substitutions. Automate quotes and credit checking, manage inventory allocation, and ensure complex orders are handled with speed and precision.		✓		

Functionality (continued)

Feature	Benefit	Priority	Acumatica		
Financial Management	Gain complete control over core accounting, accounts payable and receivable, cash management, fixed assets, project accounting, and multi-currency operations. The system supports consolidations, regulatory compliance, intercompany transactions, and reporting for multiple companies, locations, and currencies, helping you achieve complete visibility and accuracy across your entire financials.		✓		
Flexible Pricing and Discounts	Manage complex pricing strategies with ease, including volume discounts, customer-specific pricing, and promotional offers to drive sales while protecting margins.		✓		
Requisition Management	Simplify the approval process for internal requests and vendor bids, ensuring that all purchasing activities align with budget and inventory strategies.		✓		
Drop-Ship Automation	Handle drop-ship orders seamlessly by automatically linking sales orders to purchase orders, ensuring direct delivery from vendors to customers without manual intervention.		✓		
Field Service with Dispatch	Easily schedule, dispatch, and track field service teams for installation, maintenance, or repair jobs. Native service management ensures customers receive reliable, on-time support, with complete visibility into job status and field inventory usage.		✓		
Advanced Reporting and Analytics	Make data-driven decisions with role-based dashboards and actionable generic inquiries that deliver instant insights into sales trends, inventory turnover, and vendor performance with AI-powered anomaly detection.		✓		
Quality Management	Ensure products meet quality standards through integrated inspections, non-conformance tracking, corrective action workflows, and compliance documentation. Increase confidence in every shipment and simplify regulatory compliance efforts.		✓		
Mobile Access	Empower your workforce to manage inventory, approve orders, and access critical data from anywhere, on any device, ensuring business continuity on the go.		✓		

Technology

Feature	Benefit	Priority	Acumatica		
True Cloud	Scale seamlessly with real-time access and reduced IT costs, enabling users to be more flexible and collaborate more effectively.		✓		
Flexible Deployment	Deploy your system in a public cloud, private cloud, or on-premises, providing the freedom to choose the best model for your business needs today with the flexibility to change in the future.		✓		
Customizable & Flexible Platform	Tailor your platform to exact business processes without the need for a team of developers. Modify workflows, create custom reports, and adapt screens using intuitive, industry-standard tools.		✓		
Open Architecture & Seamless Integrations	Connect all essential business applications into one unified system. Leverage open APIs for easy integration with shipping, EDI, or ecommerce platforms, ensuring seamless data flow.		✓		
Powerful and Reliable Database	Manage your growth confidently. All data is stored in a high-performance relational SQL database, with full access for querying and exporting information for reporting, auditing, or backups.		✓		
Continual Improvements	Deliver regular software releases and continuous enhancements, ensuring the platform remains current with new features and security updates.		✓		
Upgrades on Your Schedule	Plan and execute system upgrades whenever it is most convenient for your business, not dictated by the software vendor.		✓		

Value

Feature	Benefit	Priority	Acumatica		
Low Total Cost of Ownership (TCO)	Reduce long-term product costs, including licensing, hardware, upgrades, and hosting. Factor in additional products required for operation, such as a web server and a database server, as well as support costs.		✓		
Intelligent Automation	Empower your team to do more with less by automating routine tasks. This helps keep staffing costs down and frees up your employees to focus on strategic initiatives that drive growth.		✓		
Scalability to Grow without Added Cost	Accommodate heavier transaction volumes, more inventory items, and more users as your business grows without compromising performance.		✓		
Resource-Based Licensing	Pay only for the computing resources you use, not for the number of users. This unique model makes it affordable to give every employee, customer, and supplier secured access to the system, fostering true collaboration.		✓		
Flexible Licensing Options	Select between subscription or perpetual licensing (ongoing operating expense versus a depreciable capital expense).		✓		
Free, On-Demand Training	Get your team up to speed quickly and maximize your investment without incurring additional training costs. Access a comprehensive library of online courses to ensure everyone can use the system effectively.		✓		
Preserve Capital	Reduce initial cash outlay for hardware and software with a cloud deployment, freeing up capital for inventory or other business initiatives.		✓		

Risk

Feature	Benefit	Priority	Acumatica		
Enhanced Security and Built-in Compliance	Get peace of mind with robust, always-on security and integrated compliance management that protects your operations, supply chain data, and reputation.		✓		
Predictable Costs	Avoid surprise IT expenses and gain greater clarity with predictable, standardized monthly IT costs that support more thoughtful planning.		✓		
Quick Deployment	Launch quickly and start realizing value sooner. Cloud-based deployments minimize downtime and expedite your return on investment.		✓		
Robust Backup & Disaster Recovery	Safeguard your data with automated backups, failover controls, and industry-leading disaster recovery, which is essential for compliance and business continuity.		✓		
Best-in-Class Security	Built-in security protects your data, applications, and devices, leveraging expertise from world-class cloud technology partners.		✓		
Data in the Cloud	Cloud hosting minimizes your exposure to cyber threats and simplifies data management, letting you focus on growing the business rather than fighting IT fires.		✓		
Seamless Integrations & Upgrades	Easily connect with other business-critical apps and get continual software enhancements, reducing the risk of falling behind or missing mandatory updates.		✓		

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](#).

