2024 Cloud ERP Evaluation Guide

Over 100 functional items to consider and compare as you search for the cloud ERP solution that's right for you

rootstock®
MANUFACTURING ERP

Finding the Right Cloud ERP for You

If you're just starting to evaluate cloud ERP solutions, then you already know the drag legacy ERP puts on your business. But choosing the right cloud ERP system is essential if you want to achieve your business goals while also building a foundation for future operational improvements. Simply moving ERP to the cloud won't do. It takes time to find the cloud ERP solution best suited to your overall strategy, flexible enough to fit your unique needs, and easily customizable where and when you need it. The right cloud ERP will also empower your teams to work smarter, connect the data from across your business, and give you easy and actionable 360-degree visibility into your business, suppliers, and customers.

But, as you begin to evaluate cloud ERP vendors, it's easy to get lost in a comparison of features and functions. Those granular capabilities are important, but it's even more important to stay focused on your business goals, take an honest assessment of where you are on your digital transformation and determine where ERP fits into your strategy and how it will enhance your business. And that's where this evaluation guide comes in!

This guide helps you focus on what's most important to you. It's structured by function so you can approach cloud ERP as a business advantage rather than just an operational tool. From sales to engineering, supply chain to financials, and service to inventory, this guide lets you weigh each item by importance, and then compare potential cloud ERP vendors to find the best fit for your needs and goals. The result won't be a direct feature-to-feature comparison, but rather a customized evaluation to show which vendor has the best capabilities in the areas that truly matter to you.
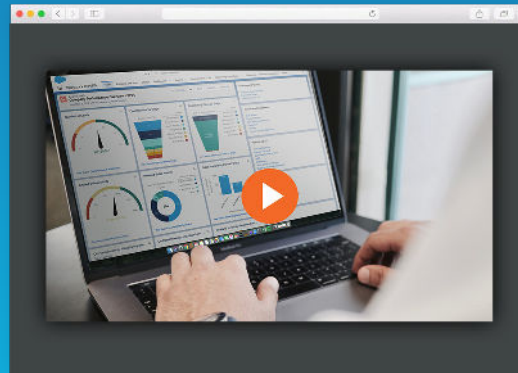
As you review the checklist items, you may think of others critical to your business, goals, or strategy. That's fantastic! This list is thorough, but it's just a starting point. You should add more capabilities to this list to truly make it your own.

Here are some additional resources to help you on your journey.

The Basics of Evaluating Cloud ERP Software

Cloud ERP Overview Video

How to Build Your ERP Evaluation Team

Sales

Functional Area	Capability	Importance (1 to 5)	Rootstock & Salesforce	Vendor 2	Vendor 3
Sales	Lead management		✔		
	Opportunity management		✔		
	Account management		✔		
	Sales agreements/contracts		✔		
	Configure, price, and quote (CPQ)		✔		
	Available to promise		✔		
	Margin visibility		✔		
	Lead time visibility		✔		
	Order production and delivery status		✔		
	Accounts receivable visibility		✔		

Functional Area	Capability	Importance (1 to 5)	Rootstock & Salesforce	Vendor 2	Vendor 3
Sales Orders	Estimates & quotes		✔		
	Configuration management		✔		
	Flexible pricing/discounting		✔		
	Flexible product types and services		✔		
	Sales tax management		✔		
	Automatic creation of sales order from opportunities		✔		
	Tag orders to projects, service contracts, and warranties		✔		
	Recurring revenue orders		✔		

Functional Area	Capability	Importance (1 to 5)	Rootstock & Salesforce	Vendor 2	Vendor 3
Engineering	Multilevel bill of materials (BOM)		✔		
	Flexible routings		✔		
	Multiple product costing methods		✔		
	Lifecyle engineering change revision and design control		✔		
	Track and trace as designed, as built, and as maintained		✔		
	Support kits, configured, and service items		✔		
Production	Work order management		✔		
	Scheduling and capacity planning		✔		
	Sales and operation planning		✔		
	Shop floor control		✔		
	Mixed production modes		✔		
	Project manufacturing		✔		
	Subcontractor management		✔		
	Disassembly		✔		
	Quality management		✔		
	Multi-plant, multi-location		✔		
	Advanced analytics for planning, capacity planning and work order management		✔		

Functional Area	Capability	Importance (1 to 5)	Rootstock & Salesforce	Vendor 2	Vendor 3
Supply Chain	Requisitioning		✔		
	Purchase Management		✔		
	Materials Requirements Planning (MRP)		✔		
	Distribution Requirements Planning (DRP)		✔		
	Replenishment		✔		
	Supplier communities		✔		
	Direct/indirect item and service procurement		✔		
	Mobile requisitioning and purchasing approval workflow		✔		
	Customizable workflow approval rules and routings		✔		
	Invoice matching		✔		
Inventory	Lot control		✔		
	Serial # tracking		✔		
	Flexible item attributes		✔		
	Allocate or segregate inventory to orders or projects		✔		
	Cycle counting		✔		
	Consigned inventory		✔		
	License plating/container tracking		✔		
	Mobile cycle counting, receiving, issuance, transfer, etc.		✔		
	Multi-warehouse		✔		
	Standard or weighted average cost elements such as material, labor, overhead, fringe, ODC, SGA		✔		
	Freight & landed cost		✔		

Functional Area	Capability	Importance (1 to 5)	Rootstock & Salesforce	Vendor 2	Vendor 3
Inventory (continued)	Shipping and receiving		✔		
	Inbound/outbound logistics		✔		
	Pick, pack, and ship from mobile devices		✔		
	Bar code, RFID, and QR code scanning support		✔		

Financials

Functional Area	Capability	Importance (1 to 5)	Rootstock & Salesforce	Vendor 2	Vendor 3
Financials	Financial reporting		✔		
	General Ledger (G/L)		✔		
	Weighted average and standard costing		✔		
	Accounts Payable (AP)		✔		
	Accounts Receivable (AR)		✔		
	Fixed assets		✔		
	Budgeting		✔		
	Recurring billing/subscriptions		✔		
	Cash management		✔		
	Credit and collections		✔		
	Drill down from balances to operational detail		✔		
	Predictive analytics and artificial intelligence		✔		
	Mobile device support across all financial applications		✔		
	Multicurrency		✔		
	Multicompany		✔		
	Multitax		✔		

Functional Area	Capability	Importance (1 to 5)	Rootstock & Salesforce	Vendor 2	Vendor 3
Customer Service	Return material authorizations (RMA)		✔		
	Warranties		✔		
	Device history		✔		
	Entitlements		✔		
	Contracts		✔		
	Case management		✔		
	Field service		✔		
	Customer communities		✔		
	360 degree view of customer orders, shipments, invoices, payments, and credits		✔		
	Complete view of ERP and CRM activity including inventory, production, and shipment status		✔		
	Advanced shipment replacements		✔		
	Lifetime traceability of field assets		✔		
	Service technician inventory		✔		

Cloud Platform

Functional Area	Capability	Importance (1 to 5)	Rootstock & Salesforce	Vendor 2	Vendor 3
Cloud Platform	100% true cloud solution (not hosted)		✔		
	Multitenant, automatic upgrades		✔		
	No version lock		✔		
	Low-code environment to empower business users		✔		
	User definable reports		✔		
	User definable page layouts		✔		
	User definable dashboards		✔		
	Visual, clicks not code workflow builder		✔		
	Embedded enterprise social media		✔		
	Artificial intelligence		✔		
	Predictive analytics		✔		
	Responsive design with mobile device support across all functions		✔		
	Single data model for ERP, CRM, and your custom apps		✔		
	Common toolsets and system administration across ERP and CRM		✔		
	Low-code mobile application builder		✔		
	Low-code supplier community builder		✔		
	Low-code customer community builder		✔		
	Large third-party application marketplace		✔		
	Ease of integration with APIs, web services		✔		
	Third-party security and control certifications		✔		
	Single point of user administration across ERP and CRM		✔		
	Online customer and training community		✔		
	Large ecosystem of third-party trainers, consultants, and developers		✔		

Keep Moving Towards the Cloud

Moving to cloud ERP is one of the biggest digital transformations you can make. It may seem daunting now, but modern cloud ERP provides a fast, smooth, and easy transition, no matter if you're moving from a legacy ERP or making the leap from spreadsheets and email. But, when you're choosing a cloud ERP vendor as your partner, experience and innovation matter. So, make sure you talk to existing customers, understand the implementation and training requirements, and see real demonstrations of their mobile and low-code/no-code customization capabilities. Don't forget to check out what the analysists have to say, too.

Remember, however, that it's important to focus on what's right for your business, goals, and strategy. A single solution will likely not have all the capabilities you require. That's why a flexible, customizable, and integrated cloud ERP is so attractive to so many companies. It puts you in charge and gives you the power to fit the platform to your needs. And today's low-code/no-code platforms offer much more advanced (and much easier) customizations than what legacy or on-premise ERP systems required. Customizations to those systems were painful. But not so with cloud ERP.

Of course, there's more to choosing a cloud ERP than just this checklist. You also need to think about your reporting needs, ease of use, industry capabilities, and much more. But don't worry. We're always here to help.

[Request a personalized demo of Rootstock Cloud ERP today.](#)

10 Cloud ERP Evaluation Mistakes to Avoid

1. Failing to plan and define requirements
2. Setting unrealistic expectations
3. Not engaging leadership
4. Not looking at the big picture
5. Choosing an ill-fitting system
6. Missing out on program features
7. Foregoing formal training options
8. Not embracing change
9. Not staffing the project adequately
10. Neglecting to create a continuous improvement strategy

About Rootstock

Rootstock Software® is a worldwide provider of cloud ERP on the Salesforce Cloud Platform. When combined with Salesforce CRM, Rootstock Cloud ERP offers manufacturing, distribution, and supply chain organizations a single platform to grow and manage their businesses.

rootstock®
MANUFACTURING ERP

(888) 524-0123   sales@rootstock.com