

# Professional Services ERP System Evaluation Checklist

Choosing a Professional Services ERP solution for your business is a long-term decision that will impact your company for years to come. With many products offering similar features, it can be challenging to determine which ones matter most. This tool is here to help simplify the process.



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



## PRODUCTIVITY

What can the product do to make you and your staff in the office and on the job site 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		
Intuitive	Easy to learn and use.		✓		
True Universal Availability	Access the system from any device, anytime, anywhere to facilitate associates working in the field and in the office. Easily communicate and collaborate with customers, subcontractors, and suppliers.		✓		
Single Database	Establish a single version of the truth. Eliminate the need to maintain integrations between applications.		✓		
Multicurrency	Operate in any currency and convert as needed.		✓		
Workflow	Automate business processes, approvals, and notifications.		✓		
Wikis	Share information and company documents among any combination of teams, departments, and external users.		✓		
Comprehensive Reporting	Make faster, better decisions with fewer mistakes. Eliminate guesswork.		✓		
Document Management	Make critical documents available to all key personnel.		✓		



## Category 2: Functionality

Feature	Benefit	Priority	Acumatica		
Financial Management	Perform standard accounting functions, including general ledger, accounts payable, accounts receivable, cash management, and tax management.		✓		
Project Accounting	Manage AP workflows, from entering an invoice through approval routing and checks. Seamless customer billing, driven by real-time project costing, includes up-to-date labor, material, equipment, and other costs.		✓		
Project Management	Provide instant project updates from the field for real-time collaboration. Manage and track all project activities, issues, and changes, including daily field reports, actual costs, and cost projections.		✓		
Resource Management	Ensure resource availability to allocate staff, equipment, and technology by team, department, and timeframe. Assign tasks and workflows to manage project resources and tie the costs to the project budget.		✓		
Customer Relationship Management (CRM)	Keep detailed client records of interactions, proposals, contracts, payments, renewals, and compliance documents. A self-service portal gives clients access to support cases and payment options.		✓		
Time and Expense Management	Capture time and expense from any device. Time entry flows to project accounting for costs and expenses related to projects or specific project tasks. Billable activities can be marked up depending on the project, task, employee, or activity performed.		✓		



## Category 2: Functionality (Continued)

Feature	Benefit	Priority	Acumatica		
Acumatica Payments	Integrated payments solution automates AR processing to reduce back-office workloads to get paid faster.		✓		
Progress and Milestone Billing	Flexible progress billing by percentage of completion or by quantity reduces project owner risk. Access AP cost transactions related to progress billing lines from the pro forma side panel for timely vendor payments and increased billing accuracy. Tie revenue recognition to project milestones or deliverables.		✓		
Change Management	Control cost overruns by automating project commitments and change order processes. Manage back charges or reduction in vendor commitments through the entry of a negative change order. Streamline change orders for multiple projects with unit rate changes, custom retainage, and cost-only change requests.		✓		
Revenue Recognition	Automate revenue recognition for billing, payments, and collections. Apply billing and revenue recognition schedules by month, quarter, year, or customized time periods.		✓		
Extend with Third-party Software	Access a robust library of enhancements available to extend the product's functionality to meet your unique business needs.		✓		
Business Intelligence and Project Insights	Use BI to go beyond spreadsheets and gain a better understanding of financial and project data. Easily drill down into relevant details on any record with standard prebuilt side panels or build customized views based on uses and roles.		✓		



## Category 3: Technology

Feature	Benefit	Priority	Acumatica		
True cloud	All functionality is accessible through the internet using a standard browser without the need for any software installation on the user's device. No additional software licensing required.		✓		
Responsive design	View and interact with every page of the application on any device with a minimum of 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 a minimum 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	Cites customer successes using their software in the construction industry.		✓		
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 backup, failover, and disaster recovery costs.		✓		
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.		✓		



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