



# ERP Implementation & Evaluation Checklist

Company: Database Providers | [www.SimpleManufacturing.com](http://www.SimpleManufacturing.com) |

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## 1. General Requirements

- Define business goals and objectives for ERP implementation.
- Identify key stakeholders and assign project owners.
- Determine budget, timeline, and ROI expectations.
- Evaluate cloud vs on-premise ERP deployment.
- Verify vendor experience in manufacturing and ISO compliance.

## 2. Core Modules & Functional Requirements

### A. Financial Management

- General Ledger setup and account structure.
- Accounts Payable / Receivable management.
- Bank reconciliation and cash management.
- Budgeting, forecasting, and financial reporting.
- Multi-currency support (if needed).
- Tax management (local, state, federal).
- Audit trail and compliance support.

### B. Inventory & Warehouse Management

- Real-time inventory tracking (raw materials, WIP, finished goods).
- Stock movements and adjustments.
- Barcode/RFID integration.
- Multiple warehouse management support.
- Lot and serial number tracking.
- Safety stock and reorder point management.

### C. Production & Manufacturing

- Bill of Materials (BOM) management.
- Work order creation and scheduling.
- Routing and resource planning.
- Capacity planning and shop floor control.

- Production cost tracking.
- Quality control integration.

## D. Supply Chain & Procurement

- Supplier management and vendor database.
- Purchase order creation and approval workflow.
- Material requirements planning (MRP).
- Supplier performance tracking.
- Automatic reorder triggers.

## E. Sales & Customer Management

- Customer database with history tracking.
- Sales order creation and tracking.
- Pricing, discounts, and promotions management.
- Integration with inventory for availability checks.
- Customer service and support modules.

## F. Human Resources & Payroll

- Employee database and records.
- Payroll and benefits management.
- Attendance and leave management.
- Performance appraisal tracking.
- Training and certification records (ISO/AS compliance).

# 3. Technical Requirements

- System architecture: cloud, on-premise, or hybrid.
- Database and server requirements.
- Integration capability with other systems (CAD, CRM, MES).
- API availability for third-party software.
- Data migration support from legacy systems.
- Backup and disaster recovery plan.
- Mobile access and multi-device support.

# 4. Compliance & Security

- Role-based access control and permissions.
- Audit trails for all critical processes.
- Data encryption in transit and at rest.
- ISO 9001, AS9100, or industry-specific compliance support.
- Regulatory reporting and documentation capabilities.
- GDPR, CCPA, or other data privacy compliance.

## 5. Reporting & Analytics

- Real-time dashboards for key metrics.
- Financial, operational, and production reports.
- Custom report creation.
- KPI tracking and alerts.
- Predictive analytics and forecasting capabilities.

## 6. User Experience & Training

- Intuitive and role-based user interface.
- User training programs and documentation.
- Multi-language support (if required).
- Online help and support resources.
- Change management support for users.

## 7. Implementation & Post-Go-Live

- Detailed implementation plan with milestones.
- Data migration and validation.
- System testing (unit, integration, UAT).
- Go-live support.
- Post-implementation review and continuous improvement plan.
- Vendor support SLA and maintenance plan