

Professional Services ERP System Evaluation Checklist

Choosing a professional services solution is a long-term decision that impacts your company for years. With many products offering similar features, it can be challenging to determine which ones matter most. This tool is designed to simplify the process by comparing features and benefits across five critical categories, reflecting capabilities that empower your growth.

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 User Experience	Easy to learn and use, reducing training time and boosting adoption.		✓		
Device Agnostic	Access the system from any device, anytime, anywhere to facilitate collaboration between associates in the field and the office.		✓		
Single Database	Establish a single source of truth, eliminating the need to maintain complex integrations between different applications.		✓		
AI-Powered Task Automation	Simplify your day by automatically handling repetitive, time-consuming tasks—reducing manual work and freeing your team to focus on what matters most.		✓		
AI Anomaly Detection	Unlock immediate productivity by using ready-to-use anomaly detection and AI templates for faster, data-driven decisions and process automation.		✓		
Comprehensive & Insightful Reporting	Make faster, better decisions with role-based dashboards, advanced data filters, and ready-to-use reports with anomaly detection.		✓		
Automated Workflow	Automate key business processes, approvals, and notifications to enhance efficiency and ensure nothing falls through the cracks.		✓		
Document Management	Make critical documents available to all key personnel, ensuring everyone is working with the most current information.		✓		

Functionality

Feature	Benefit	Priority	 Acumatica		
Financial Management	Perform standard accounting functions, including general ledger, accounts payable, accounts receivable, and cash management.		✓		
Advanced Project Accounting	Manage AP workflows from invoice to payment. Gain real-time project costing with up-to-date labor, material, and other costs.		✓		
Automated AR & Integrated Payments	Accelerate payment cycles and get paid faster by automating accounts receivable processing and reducing back-office workloads.		✓		
Enhanced Project Management	Provide instant project updates from the field. Manage and track all project activities, issues, and changes.		✓		
Integrated Change Management	Control cost overruns by automating project commitment and change order processes.		✓		
Resource Management	Ensure resource availability by allocating staff and technology by team, department, and timeframe.		✓		
360-Degree Client View	Consolidate all client interactions, communications, proposals, contracts, and support cases into a single, accessible record.		✓		
Service Management Enhancements	Expand service delivery capabilities with tools for scheduling, service tracking, and lifecycle management, ensuring projects run efficiently and clients remain satisfied.		✓		

Functionality (continued)

Feature	Benefit	Priority	 Acumatica		
Cross-Functional Integration	Connect seamlessly with manufacturing and distribution workflows for greater operational flexibility and the ability to manage complex, multi-disciplinary projects.		✓		
Automated Revenue Recognition	Simplify financial tracking and compliance by automating revenue recognition tied directly to project milestones or custom schedules.		✓		
Time and Expense Management	Capture time and expenses from any device, with entries flowing directly to project accounting.		✓		
Project Task Time Collection	Allow employees to allocate time to specific projects or individual project tasks for granular cost tracking and analysis.		✓		
Progress and Milestone Billing	Reduce risk with flexible progress billing. Tie revenue recognition to project milestones or deliverables for accurate financial forecasting.		✓		
Payroll	Streamline payroll for project-based work by connecting time tracking to financial and project accounting systems.		✓		

Technology

Feature	Benefit	Priority	 Acumatica		
True Cloud Architecture	Access all functionality through a standard browser without needing to install software on a user's device.		✓		
Mobile-First Responsive Design	View and interact with the application on any device, facilitating seamless collaboration between field and office teams.		✓		
Modern, Customizable UI	Give users a modern look and feel with customizable screens and dashboards, improving usability and user satisfaction.		✓		
Field Collaboration Tools	Enhance field-to-office communication and efficiency with integrated mobile time and data collection, keeping project information current and accessible.		✓		
AI-Powered Predictive Insights	Identify potential risks and opportunities proactively with built-in anomaly detection and predictive analytics.		✓		
Customization with Standard Tools	Modify business logic to meet your unique requirements using industry-standard tools, avoiding proprietary languages.		✓		
Upgrade on Your Schedule	Plan upgrades at dates and times that are convenient for your company, not the software vendor.		✓		
Flexible Deployment	Deploy the product in the cloud or on-premises, and switch models anytime it makes sense for your business.		✓		

Value

Feature	Benefit	Priority	Acumatica		
Low Total Cost of Ownership (TCO)	Reduce long-term costs over the lifetime of the product, including licensing, hardware, upgrade, and hosting costs. Factor in additional products required for operation, such as web server, database server, and support costs.		✓		
Scalability to Grow with Your Business	Accommodate heavier volumes, more projects, and more users as your business grows without compromising performance.		✓		
Scalable, Consumption-Based Pricing	Pay only for the resources you use, not the number of users. Accommodate growth without being penalized for adding employees.		✓		
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 other business initiatives.		✓		

Risk

Feature	Benefit	Priority	 Acumatica		
Simplified Implementation	Minimize risks and unplanned costs associated with ERP transitions through a streamlined deployment and onboarding process.		✓		
Best-in-Class Security	Protect sensitive data and ensure business continuity with robust platform, web, and computer security at no additional cost.		✓		
Predictable Costs	Avoid spikes in IT costs. Standardizing on a platform allows you to predict your monthly cost for the system.		✓		
Quick Deployment	Eliminate time delay and risk of unplanned costs by deploying quickly with a cloud solution.		✓		
Backup and Disaster Recovery	Prepare for the unexpected. Cloud deployment lowers backup, failover, and disaster recovery costs.		✓		
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.		✓		
Vendor-Managed Updates	Eliminate the risk of missing an upgrade by choosing a cloud solution that is continually updated by the vendor.		✓		

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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](#).

