ERP Cloud Buyer’s Guide
Version 4
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Executive Summary

Cloud computing and software as a service (SaaS) have become accepted ways to provision software. Yet, much confusion still exists about these two methods of software deployment and their actual meanings. Organizations are ready to commit to utilizing the cloud but are unsure of where to start and what options are available. Now that cloud has become mainstream technology, organizations are faced with the increasingly complex task of calculating a true total cost of ownership (TCO) and the return on investment (ROI) a cloud solution can bring.

Due to the ever-increasing types of delivery models, architectures, languages, operating systems, integration points, database compatibility, additional features/functions, and managed services, the numerous public and private cloud options available have led to a muddied understanding of cost for a cloud solution versus an on-premise solution.

Cloud computing and SaaS are evolving so quickly that SaaS solutions are more readily available than ever before. It was not that long ago, when certain applications were not available as SaaS or cloud options at all. Traditional on-premise vendors have embraced the shift towards the cloud and are offering complete enterprise resource planning (ERP) product suites in the cloud. ERP software vendors now offer a diverse range of options to accommodate the main types of ERP classifications, such as process, discrete, mixed mode, and engineered-to-order. The increasing number of vendors offering ERP as a cloud/SaaS solution enable organizations to better align their business needs with the correct software and IT that support their specific requirements. This guide was created to help organizations by clearing up some of the misconceptions and by clarifying certain aspects, companies should be aware of when purchasing an ERP cloud or SaaS solution.

One of the main purposes of this guide is to provide education and awareness on cloud and SaaS computing. The Eval-Source ERP Cloud/SaaS Buyer’s Guide will examine such factors as key vendors, identification, vendor descriptions, target markets, the cloud software market landscape, cloud computing and SaaS benefits, important market trends that could impact software-buying decisions, security, TCO, functionality and definitions. The information presented in this guide provides organizations with a detailed summary of the most accurate information possible to help them make a well-educated software-buying decision.
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The estimated dollar value of the cloud and SaaS market varies widely by consulting and analyst firms alike due to which categories, applications, infrastructure, platforms etc. are included within the definition of the taxonomy. The common undercurrent among all estimated market sizing is that cloud and SaaS have become legitimate enterprise software options, and the growth is rapid. Cloud and SaaS computing have become game changers in terms of organizations’ perceptions that it has disrupted their view of the traditional licensed on-premise model.

Because of this change in perception, more vendors are offering products, services, applications with cloud and SaaS and managed services computing options, which further drives industry adoption. The cloud has facilitated the offering of many new products, services, and applications virtually. It is this plethora of choice that organizations find confusing. The options of platform as a service (PaaS), infrastructure as a service (IaaS), SaaS, service-based applications, and traditional IT functions can all be provisioned using the cloud. Now services, storage and outsourcing have added to the size of the cloud, which would also increase the market size proportionally.

Based on Eval-Source’s research, a CAGR of 21% was calculated to the year 2018. We estimate the cloud computing market for enterprise application spend will grow to $135.05B by 2018. This is calculated from our last estimate in 2014 ($63B) with a 21% CAGR.

Within the last year and a half, many ERP vendors are now offering cloud solutions. This has also increased the number and types of ERP systems available for customers. Service based ERP’s are starting to challenge manufacturing brands of previous staple vendors. Many new market specific vendors now have dedicated ERP software which have emerged. Verticals such as retail, wholesale distribution and in the case of some traditional ERP vendors who usually offered discrete manufacturing, are now offering process-based and services functionality. ERP for service-based industries has formed its own enterprise application market with established vendors and best of breed point solutions. Organizations now have a multitude of choice on a plethora of platforms covering many architectures and cloud deployment options. These options complicate the software evaluation procedure and may increase the project lifecycle, as increased research and market comprehension must be achieved before moving onto the next stage of the evaluation project.
ERP Cloud Computing Trends

Increased User Functionality

ERP vendors are finally starting to pay attention to the consumer trend of making things easier to do. Typically enterprise software were slow to react to changing trends, customer requests and functionality updates. ERP systems of old had stringent SOA, platform and infrastructure capacities which did not easily allow for system agility. Most scenarios required the intervention of additional IT (programming, database architecture assistance) to make and implement even small changes.

Finally, ERP systems have caught up to the marketplace by redesigning their SOA and platforms to enable customers to facilitate changes on their own. Trends of mobility, social and ease of use have started to become more prevalent in ERP design. These functionalities are starting to appear in many of the modern ERP cloud systems. While convenient, organizations can be lulled into selecting a sexy user interface over needed functionality.

We have seen many ERP software vendors incorporate social, mobility, BI/EPM and simplifying ease of use in everyday functionality. This mini revolution of and easy to use GUI have benefitted customers by making it easier to get every-day work done. An important aspect to consider when selecting software is the level of organizational skill. Is your company technology savvy, are they field service engineers, customer service reps, operational workers or executives that just need to see reporting – these are considerations that may assist you on finding the correct fit of software for your company. Organizations should investigate what features/functions are important to execution of their business and select the appropriate software accordingly.

In the case of social business and some see CRM systems we have seen this taken too far. The GUI has become too simple and undermines the integrity of operations and trust from employees using the system. Lack of trust or difficulty of use from employees can render a system obsolete and quickly making it shelf-ware.

Rise of ERP for SMB

The cloud market has had a great effect on SMB. The cloud has allowed many more new ERP software vendors into the market that did not previously exist. A short time ago, the only options available were to wait on the larger vendors to turn their o-premise solutions to either a hosted or managed services scenario often without the on-premise functionality. While that has continued to happen and traditional ERP migrate its solutions to the cloud new vendors are sprouting up to fill a much needed market gap.

SMB was previous an afterthought. Larger systems would scale down to facilitate these customers, however, the burdensome licensing, maintenance and implementation still was an issue which more often than not, excluded smaller businesses. New cloud ERP vendors have sprung up covering a wide range of industries and verticals.

Smaller ERP cloud-based systems are rapidly addressing many of the under-served niches that SMB’s need. SMB’s no longer have to wait for a “light” version of software that is still expensive and may not properly address their business needs.
Smaller ERP systems are emerging to offer a wide range of functionality often with less complexities than the big systems that have scaled down require. An important point to note here is the complexities or lack thereof that these smaller systems contain. A broad solution with lack of depth or a solution with deep functionality and a smaller breadth may be more appropriate – now customers have this choice. Lighter IT footprint and administration is a key selling point for smaller newer ERP systems that cater to SMB. The freedom of not looking after a new system is a plus to SMB as they often do not have the resources to construct the IT infrastructure that an ERP requires. These new cloud systems do that for them thereby simplifying their entry to an ERP system and often with more economically.

The larger vendors do scale well to the SMB as can be seen, some of the minimum user counts can be as low as a single user. It all boils down as to how your organization is structured, IT level of competence, IT solution alignment with business requirements, proper functionality, agility fit and of course economics.

Two-tiered Systems

This new trend applies mostly to larger multi-national firms. In this scenario, the corporate entity (where the head office is located) has already invested significantly into its main ERP system, namely SAP or Oracle. Satellite offices around the globe (for the multi-national) often require unique functionality for localization and market variances. Due to geographic limitations, IT staff training, employee training, security issues to access the new system and procedures require additional change management. The satellite office often has its own procedures and systems to which it is already accustomed. The larger system may cause difficulty in operations and not provide the local variances or capabilities required, such as tax localization or regulatory compliance etc. The satellite offices are apt to adopt and implement smaller versions of cloud ERP solutions that are often different from the main ERP solution used at the head office. This scenario is especially true for manufacturing companies, where individual plants implement another ERP system entirely.

The satellite plants operate as individual entities year round, utilizing their own system until the year-end accounting cycle expires. The financials are then aggregated from the child systems and imported to the parent system. All entities are treated as divisions and cumulatively all financials are combined into the parent system, where the tier-one software has been implemented.

Recently this trend is proving popular for organizations that have been acquired or have recently merged with other companies and many systems are already in place. The two-tiered strategy is a quick way for organizations to consolidate their operations without major impact to local operations. Organizations benefit from adopting this strategy because they need to neither change numerous operational methods nor require employees to be trained on the new system and tasks that could affect employee morale and company throughput, influencing bottom line results.

Cloud-based Business Intelligence (BI)

Organizations are now employing use of the cloud or a SaaS model to provide BI from their many systems. Content created by social media, collaboration, and email is often unstructured and hard to categorize and tag, and the question remains on how to access it. Cloud-based and SaaS BI solutions can provide dashboards that allow individual users and groups to combine the data, using their own platform as the backbone to aggregate that data. Cloud use facilitates the aggregation of information and can be delivered through a cloud or SaaS-based BI application. Cloud-based ERP systems have increased their depth of functionality and have increased usability for user types.
Hybrid Systems

The use of hybrid systems as a legitimate way to increase infrastructure, bolster functionality, and speed implementation times is starting to gain traction with organizations. This emerging trend refers to supplementing an existing (usually on-premise) software and technology with a cloud computing solution, creating a hybrid system.

Many companies have made the investment in on-premise software and are reluctant to replace existing systems, but when investigating methods to supplement their existing systems, they tend to select SaaS and cloud computing software. Because SaaS and cloud computing is very flexible in terms of delivery, they can be integrated in many ways to existing on-premise systems. Cloud computing can offer new infrastructure, platform, applications, products, and services and any combinations thereof.

The hybrid system approach is a lower-risk method for companies to get comfortable and experiment with SaaS and cloud computing technology without starting from scratch. The consequences of adding a cloud system to the existing system may not affect current operations, as familiar software is left untouched and already in place.

An example to illustrate this type of adoption would be a company that currently has a legacy or homegrown customer relationship management (CRM) system containing data that has accumulated over many years, causing the company to be reluctant to replace the entire system. Issues such as data migration, integration, professional services, and new functionality may prove problematic for the application. A SaaS or cloud computing application that has financial and distribution capabilities can be added to enhance functionality for the existing system.

Business Agility

The fast pace of today’s business environment requires organizations to be agile and flexible in both their business operations and in corresponding IT systems to support changes.

Our research with end-users indicates that although features and functions are important aspects of a software evaluation, the importance of business agility is emerging as the next major factor in software buying decisions.

When an organization makes changes to its business by adding additional products or services or by provisioning its offerings through different methods, it is important their systems are capable of supporting their new business strategy. Organizations are investigating business agility as a key software selection criterion.

An organization’s ability to quickly adapt its systems to support a change in operations or business model requires business agility. Whether it was new configurations, redefinition of workflows, additions to database requirements or a host of other system tweaks, or custom programming, the vendor previously had to be engaged to make these changes.

The new landscape vendors have created through their technology and inherent software infrastructure allows organizations the ability to provide their own changes without much vendor interaction. This enables organizations to save money, control their own system changes, manage change management more effectively, and allows quick systems changes should the business require them.
Social in ERP

Typically manufacturing ERP systems are slower to adopt newer technologies. However, vendors have responded fairly quickly to this trend. Social in the realm of ERP (B2B) has a different connotation that social from a B2C aspect entails. From an ERP perspective social is used as collaboration for both internal and external purposes. Traditional ERP systems often lacked the ability to communicate between employees and making data readily available for use. These vendors have added social functionality by increasing the collaboration within the application. Additional collaboration has been carried through to supply chain, manufacturing and trading partners. The ability to share information or collaboration is what is considered social within ERP software.

Social in a B2B environment can be used for collaboration, content and document management, employee sharing and allows corporate-wide reporting and consumption of information from all departments throughout the organization. Social within the ERP realm is used internally by taking collaboration and gathering intelligence on the shop floor, instant status updates via social streams similar to Chatter, twitter or LinkedIn social streams. Social for external uses can be used for several purposes such as crowdsourcing, locating experts and soliciting feedback or listening and monitoring customer complaints. Social within ERP has been slow to include these functionalities in mainstream ERP.

SaaS and cloud versions of ERP have a higher propensity to include these social features due to less restrictive architecture. Business process integrations, use of web services and REST API’s are making it easier to include social functionality within new ERP software. Because of these easy methods of integration, which can often be done seamlessly and relatively quickly it may not be necessary for ERPs to include social as part of the ERP system. Social functionality can be added very quickly and even integrated to a completely social software application. Organizations should not disqualify a more than adequate ERP vendor for lack of social functionality. Nexgen ERP will soon incorporate social functionality as the market is demanding social functionality.

With other software such as CRM becoming fully social and evolving into SCRM, ERP solutions will have to evolve quickly to adapt to expected functionality that end-users expect.

It is imperative to distinguish social between B2B and B2C. Social uses in the B2C area vary greatly and organizations should not confuse the uses or the features that differ from ERP enterprise software opposed to personal social activity. Not distinguishing between these two categories of B2B or B2C may lead to IT failure if weighted improperly. Social in ERP overlaps with another trend; cloud-based BI and the extension of workflows. These three trends combine to extend the capabilities of collaboration, additional functionality and increased usability.
Definitions

These definitions are provided in the general context of cloud computing, SaaS and enterprise software. They are broad in scope and reflect the context in which the **Eval-Source Buyer’s Guide** is written. These definitions are provided for basic usage and do not represent the only meanings or configuration options available.

**Application Level Security**

This refers to another layer of security offered by software vendors. The application is subject to additional security credentials through individual or group user rights. These tiers of security are controlled by the system administrators and are part of the corporate IT security strategy. Typically, SaaS and cloud computing ERP applications have this security feature as standard as is the case for corresponding on-premise applications.

**Big Data**

Big data usually includes data sets with sizes beyond the ability of commonly used software tools to capture, curate, manage, and process the data within a tolerable elapsed time. Big data sizes are a constantly moving target, as of 2012 ranging from a few dozen terabytes to many petabytes of data in a single data set. In an enterprise software, context, “big data” has taken on the connotation of any application or service that consumes produces or stores a large amount of data. This has come to include auxiliary applications that integrate to the ERP and business processes that reside outside the ERP application for tools that manage workflows and integrations such as SnapLogic.

**Business Continuity/Data Recovery**

This refers to how the vendor handles disruptions of service to the application. Normally this considered the redundancy or contingent plans should a major disruption such as data center failure, natural disaster, breech of security etc. The vendor will disclose this information as to how they will provide service if an outage should occur.

**Cloud Computing**

Internet-based computing whereby shared resources such as software, storage, hardware, virtualization, and information are provided to customers on demand. This includes the entire ecosystem of products and usually other IT services. Cloud computing includes all aspects of SaaS, PaaS, IaaS, DaaS (desktop as a service), StaaS (storage as a service hosting, and other computing services.

**Hosted Model**

A business provides a combination of IT services, including security, web hosting, storage, email, application hosting, etc. These providers act as both application service provider (ASP) and Internet service provider (ISP). Any combination of products and/or services is included within this delivery model.
**Hybrid Cloud Model**

This model consists of components of a cloud offering by the organization and/or provider to create the cloud deliverable. Both parties contribute to delivering the cloud model and portions of the architecture. An example of this approach would consist of the company providing its own database and hardware while the vendor provides the application and maintenance services for the box.

**IaaS**

Infrastructure as a service. Organizations architect their IT infrastructure, usually through virtualization from cloud and hardware vendors, to provide such components as servers, data centers, network hardware, etc.

**Multi-tenancy**

Multi-tenancy refers to a principle in software architecture where a single instance of the software runs on a server, serving multiple client organizations (tenants). Since multi-tenant solutions were first introduced on mainframe computers in the 1960’s there have been three evolutions of the solution – time sharing, application server provider (ASP) Hosting, and the more recent third iteration featuring shared multiple components (popularized by Salesforce.com) that provide additional customization to a group or users within the same client organization. In today’s popular version “three” of multi-tenancy, the application code, operating system, data storage software, and computing resources are all shared. Each company uses the same version and the same instance of the software, but maintains the ability to select modules and customize to their specifications. A single shared database houses all customers, with partitioning to protect the data from co-mingling and other security threats.

In 2012, a fourth-generation of multi-tenancy has been introduced that introduces greater data security and application portability (i.e. for movement of the deployment to other cloud environments or to an on-premise deployment), by providing individual databases for each company. Companies deployed in this model still maintain in a shared multi-tenant single software release, and a shared computing environment with the same configuration advantages of the third generation of multi-tenancy, but the individual data bases add change management/security advantages not available in the third-generation offerings.

**PaaS**

Platform as a service. Organizations employ a common cornerstone to enable a multitude of different applications that are capable of operating from a common architecture. This approach minimizes integration and other deployment issues that may occur if implementing different system types.
**Private Cloud**
This is any combination of products or services that reside behind a company’s firewall. Companies that have a dedicated database, their own security, hardware, and administrative control of their resources and is all controlled by the organization. This model can have a managed services option, with the vendor taking care of administrative service and maintenance on the company’s behalf while all the software and hardware remains between the four walls of the organization.

**Public Cloud**
This is when a service provider makes resources such as applications and storage available to the public over the Internet. This model usually resides outside a company’s firewall. Examples of a public cloud are Salesforce.com and Zoho.com.

**SaaS**
Software as a service. Deployed over the Internet. A provider licenses an application to customers as a service on demand, through a subscription or a “pay-as-you-go” model. There are several pricing and payment options that are offered. An example of SaaS is Salesforce.com.

**Session Management**
This refers to the activity within the application through the browser. In the event that there is not constant usage within the instance the application will timeout due to user inactivity. The user will then be forced to log in again using their security credentials to reactivate the session. The application should recall past activities/transactions etc. from where the user previously left off. This is often the most common security tier.

**Single-tenancy**
Houses the data for one company only and has its own instance of the software placed on an individual server or segregated via extensive security controls to create its own virtual server. Single-tenancy differs technologically, functionally, security-wise, and in appropriateness based on geography, industry type, and a host of other variables as compared to hybrid or on-premise systems.

Usually this model delivers a final version of the application and providers provide services, including integration to other apps, databases, and system integrations. Data migration may be difficult for moving companies’ applications and vendors of the software, so it’s important to investigate the terms for data release costs.

**Vendor Lock-In**
This refers to a component of the service level agreement whereby if upon contract termination the customer is charged a preset amount to release all accumulated data stored on the SaaS or cloud providers system. There is usually a minimum commitment time as outlined in the SaaS cloud computing agreement. Data can be offloaded in many different formats such as external storage, Excel spreadsheets, CSV, txt files, databases etc.
ERP Specific Definitions

ERP
Enterprise resource planning. These are individual business functions and processes that are combined into one integrated single platform that make up the application software suite. By providing various functionalities through amalgamation of several business functions, a common application interface is used, and the software features and functions are part of one software solution. The integrated suite allows for the application, database, and one platform, and the interface is provided by one vendor. This flexibility simplifies usage and decreases administrative operations, thereby saving the company money.

For the purposes of this buyer’s guide, we have classified an ERP system to contain the following modules (individual business functions) and the definitions of each module is provided below.

Business intelligence/enterprise performance management
This portion of the application encompasses all aspects of enterprise and individual reporting. It includes all enterprise key performance indicators (KPIs). Users can be individually defined by department. The functionality to monitor the entire company can take several forms, such as reports, in that they may be exported in Word, Excel, CSV, etc. form, or reside locally within the ERP application. Oftentimes many new ERP software solutions contain dashboards for quick and easy consumption of data, with real-time information available.

CRM client and contact management
The CRM functions of the application pertain to client and contact management. CRM functionality within suite applications has come to include sales force automation and campaign management that encompasses marketing functions. Traditional CRM-based functions have extended to include social media management and have deeper integration to human resources (HR) and payroll modules.

Financials
The financials module tracks every finance-related activity the organization generates. This includes payroll and all operating expenses. The finance module also provides the mechanism to track and manage cash flow, expenses, and invoices for the entire organization. While other modules can easily be added to accommodate nearly any type of business requirement, these base modules described above should provide an adequate starting point to combine necessary business functions into one cohesive application.

Human resources/human capital management
The human resources/human capital management (HR/HCM) module tracks all employee-related information. The module may include such functions as compensation grades, time sheets, vacation time, workforce management, scheduling, succession planning, recruiting, benefit administration, etc. HR/HCM functionality is deeply integrated with such other modules as payroll and financials.
Inventory management
A way to track inventory that is stored, on order, or in transit and identify physical inventory locations, either within one facility or several. This usually includes methods for planning/forecasting, replenishment and fulfillment processes.

Payroll
The payroll functions can widely vary within an ERP system. They can range from gathering employee-related information, along with times, to exporting the information or residing locally. By residing locally, the ERP application creates the necessary payroll information required to compensate employees. This module has very deep integration with the HR/HCM module, as these are often extensions of each business function.

Procurement
These application functions refer to all enterprise sourcing. This includes everything from sourcing suppliers for raw materials to internal requirements such as office supplies. Any procurement functions that generate expenses both internally and externally are recorded and posted within the financials module.
ERP Module Composition

The figure below illustrates a typical ERP system. These functional areas are considered the base composition for an ERP system. The relationship of combining all of these modules allows for multiple functions from a single piece of software.

The additional modules can be added to the core SOA platform based on the type of ERP required. Manufacturing and Services have several functional and technical components within each area of functionality that are further divided to specifically fit the type of business either Service-based or Manufacturing-based.

Figure 3. ERP Module Composition
Vendor Profiles
Quick Facts

Address
7927 Jones Branch Drive
Suite 3100
McLean, VA

Global Offices
Indonesia, Jakarta
Russia, Moscow
Singapore
Mexico
U.S.A

Product Lines
Acumatica Cloud ERP
The product consists of a set of completely integrated modules:
- Acumatica Financial Management Suite
- Acumatica Distribution Management Suite
- Acumatica Project Accounting Suite
- Acumatica CRM

Add-Modules
- Intercompany-Accounting (add-on to Financial Suite)
- Fixed Assets Module (add-on to Financial Suite)
- JAMS Manufacturing for Acumatica (third party add-on)
- BVCommerce for Acumatica (third party add-on)
- Other third party add-ons are available

Vertical Specializations
Deltek's Essentials offerings are the only cloud-based management solution to serve the complete project lifecycle needs of professional service firms. With a solution that is easy to buy and simple to own, you'll gain visibility across the firm, and more control over people and projects. By bringing wider visibility and tighter project control, Deltek First helps you achieve expected utilization from your people, and anticipated profit from their work. Instead of trying to stitch stand-alone sales, project or financial reporting tools into a cumbersome, ill-fitting patchwork, consider the easy-to-buy and simple-to-own advantages Deltek's unified approach brings to firms of all types and sizes. Deltek has established a customer base of over 6000+ organizations worldwide. One of the few ERP systems for Professional Services firms. Deltek also covers contract manufacturing (also known as ETO) as can be seen from its specialized industry focus.
Quick Facts

Address
804 Las Cimas Parkway
Austin, Texas 78746

Global Offices
Worldwide Headquarters is in Austin, TX with an additional 56 corporate offices in 34 countries.

Epicor Company Profile

The Epicor enterprise resource planning (ERP) Express Edition is a comprehensive software solution for job shops and small manufacturers that is provided in the software as a service (SaaS) model. Express combines broad functionality in an end-to-end solution specifically for organizations like yours—providing you with everything you need to manage your opportunities, orders, and operations in one integrated solution.

Express has been developed from the next-generation Epicor ERP software solution. It leverages core functionality that has been in use and proven at thousands of businesses for more than 40 years. Within Express, Epicor has brought together the broad range of functionality small manufacturers require into a single end-to-end solution to manage: customers and contacts, opportunities and orders, products and production, accounting and payroll, and more. Further, since Express is based on the same software as Epicor on-premise editions for mid-sized and enterprise customers, you are ensured that it is capable of meeting your needs as you grow. Whether your business is a job shop, machine shop, plastics extruder, stamper, or other type of manufacturer, however you account, cost, or produce, Express is flexible enough to support your business process.

SaaS has quickly become a compelling and credible delivery model for business applications. SaaS, also referred to as “On-Demand” or “Cloud Computing,” eliminates many of the barriers that keep companies from implementing or upgrading their software. More importantly, it enables you to focus on your core business operations instead of managing IT.
The Express delivery model is available to you on-demand, as a service, so there’s no hardware or software to install or maintain – Epicor handles all that for you. All you need is a workstation with an internet connection and users have access to the system. Ongoing software updates and system maintenance are provided and managed by Epicor so there’s zero IT overhead.

The performance, availability and security of the Express system are as good, if not better, than that of a typical on-premise software environment. To ensure system reliability Epicor has made significant investments to guarantee 99.5% or greater system availability.

As the solution is provided on-demand and pre-configured for manufacturing, the implementation process is simplified, you are able to quickly setup your system and go-live in as little as 20 business days. There is no hardware to set up or software to install, the implementation is solely focused on configuring the system to your organization’s specific needs and migrating your business data. Epicor provides templates, pre-built data sets, online training resources, and access to Epicor experts to help you get up and running as fast as possible and effectively using the solution.

Express is provided on a simple subscription basis. There are no large up-front costs, instead there is a minimal setup charge and then an affordable monthly fee for the service. Everything is included within the single monthly fee – software, hardware, support, training resources, and on-going system maintenance.

Epicor has a long history providing software to manufacturers of all sizes. Today, thousands of job shops and small manufacturers use Epicor solutions to effectively manage their businesses. And while Express is based on the latest technology, its Epicor’s more than 40 years of experience with organizations like yours that is the foundation of the solution. Experience matters when it comes to delivering a product or service that meets the needs of an industry and the right software solution can help you transform your business and operations. Express is such a solution - providing broad functionality, specific to the needs of manufacturers, priced affordably, and delivered in a manner that minimizes complexity.
FinancialForce.com Company Profile

FinancialForce.com delivers ERP at Customer Speed™. Built on the Salesforce1 Platform, FinancialForce ERP equips customer-centric businesses with a unified cloud platform and all the applications necessary to grow both the top and bottom line. Our Financial Management, Human Capital Management (HCM), Professional Services Automation (PSA), and Supply Chain Management (SCM) apps allow businesses to increase the speed in which they operate and be more responsive along every touch point of a customer’s journey. Founded in 2009 and headquartered in San Francisco, FinancialForce.com is backed by UNIT4 and salesforce.com.

FinancialForce ERP aligns your systems of engagement with your systems of record, enabling you to instantly leverage the latest cloud, social, mobile and customer facing technologies. When all your systems are running fast, efficiently and are aligned around the customer – at that point – you have achieved ERP at Customer Speed.
Take advantage of modern, world class systems and applications without the IT costs and headaches, and get:

- Real-time analytics from anywhere, at anytime
- Mobile device support for iPads, iPhones, Droids, Blackberries etc.
- Chatter, the social media and collaboration tool for business.
- Customization and integration tools to customize and link your systems.
- Easy integration for your custom and third party applications with FinancialForce ClickLink™.
- Authorization workflow tools to coordinate your entire company.
- A full range of development tools to build your own app on the same cloud in less than 1/5 the time.
- 2,200+ complementary and vertical applications listed on the AppExchange that integrate with FinancialForce.com and salesforce.com applications.

“At every point of interaction with customers, we build trust and satisfaction through communications, visibility, problem solving, accuracy and rapid response. During the year we implemented FinancialForce ERP, we grew revenues by 15% while reducing operational headcount by 30%.”

R.J. Smith, ISC
**Quick Facts**

**Address**
Intacct Corporation  
150 Almaden Boulevard, Suite 1500  
San Jose, CA  
95113

**Global Offices**
Intacct Software Pvt Ltd  
7th Floor, Sona Towers  
71, Millers Road  
Bangalore

**Product Lines**
Revenue Management, Advanced Revenue Management, Multi-Currency, Global Consolidations, Project Accounting, MAX for Salesforce, Web-Services, Development Sandbox, Inventory Management, Automated Sales Tax (AvaTax Pro)

**Add-On Modules**
Modules vary by ERP solution. Additional modules available through partners as well as customizations

**Vertical Specializations**
Automotive, Metal forming, High Tech/Electronics, Aerospace & Defense, Industrial, Food & Beverage

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**Quick Facts**

**Address**
Civica Office Building  
205 108th Ave. NE, Suite 400  
Bellevue, WA  
98004

**Global Offices**
Subsidiaries in 110 countries

**Product Lines**
The Microsoft Dynamics® ERP product family covers Microsoft Dynamics® AX, Microsoft Dynamics® GP, Microsoft Dynamics® NAV, and Microsoft Dynamics® SL

**Add-On Modules**
More than 2000 add-on solutions developed by business partners for all four Dynamics ERP Products

**Vertical Specializations**
Manufacturing, Distribution, Retail, Professional Services, Public Sector and more
Quick Facts

**Address**
2955 Campus Drive, Suite 100
San Mateo, CA 94403-2511
United States

Address
900 Tower Dr.
Suite 1400
Troy, MI
48098
Northern & Southern California

**Global Offices**
Australia, Canada, Czech Republic, Hong Kong, Japan, Singapore, Spain, Philippines, UK, Uruguay

**Organizational Fit**

**Product Lines**

**Add-On Modules**
Modules vary by ERP solution. Additional modules available through partners as well as customizations

**Vertical Specializations**
Software, Wholesale Distribution, Manufacturing, Retail, Services Non-profit, Software/Internet Companies, Wholesale Distribution, Advertising and Digital, Marketing Agencies, Media and Publishing Financial Services, Healthcare, IT Services, Professional Services, Consulting, Energy, Education

Quick Facts

**Address**
900 Tower Dr.
Suite 1400
Troy, MI
48098
Northern & Southern California

**Global Offices**
**European Office:**
Nymphenburger Str. 4
80335 München, Deutschland

**Organizational Fit**

**Product Lines**
PLEX-Online ERP

**Add-On Modules**
All modules included as part of ERP solution. Plex offers additional modules with over 100+ modules

**Vertical Specializations**
Automotive, Metal forming, High Tech/Electronics, Aerospace & Defense, Industrial, Food & Beverage
Quick Facts

Address
3290 33rd Street South
Saint Cloud, MN
56301

800.457.3548
info@processproerp.com

Product Lines
Process Pro Premier 10.5

Add-On Modules
Automated Warehouse Solution (AWS), Dock Scheduling, Research & Development, Nutritional Labeling, FDA Compliance & Validation, Web interface, UPS Link, EDI, Payroll (Optimum Solutions), Human resources (Optimum Solutions), Time & Attendance (Optimum Solutions), Parcel Manifesting/Rate Shopping (Freight +), Quality Management (UniPoint), Safety Data Sheet (SDS) Authoring (Lisam), Additional Accounting Functionality

Vertical Specializations
Process Manufacturers in Food & Beverage, Nutraceuticals, Pharmaceuticals, Cosmetic & Personal Care, Specialty Chemical Industries

Process Pro Company Profile

ProcessPro is a leading mid-market ERP software solution for the process manufacturing industry. Designed specifically for manufacturers that combine batches of mixtures, ProcessPro seamlessly integrates all aspects of plant operation, from beginning order entry through manufacturing, packaging, shipping, inventory, and accounting. ProcessPro has been serving the food, beverage, pharmaceutical, nutritional supplement, cosmetic, and specialty chemical industries for more than 25 years.

ProcessPro. The Process Manufacturing Experts

At ProcessPro, we believe in one basic rule: get more from your information and you will get more from your business. It’s that simple. Intelligent Enterprise Resource Planning (ERP) software, designed specifically for batch process manufacturers like you, can help deliver an incredibly elegant solution that not only helps you keep up with your business information, but also allows you to get ahead of it – becoming more efficient and profitable in the process.
**Speaking your language. Understanding your needs**

There are other providers of ERP software solutions, but none that design, develop and sell solely to your industry. What you gain with ProcessPro is the experience and insight of process manufacturing experts who understand the unique needs of your industry, from lot tracking to formulation management to regulatory compliance.

**The Power of ONE**

Developed by us. Sold by us. Installed by us. Supported by us. It's a powerful formula and one that has helped us – and our clients - succeed. Gain peace of mind in knowing that you have a single source to deal with at every phase – no resellers that lack support or third-party installers who lack knowledge of the software. And rather than off-shore or third-party technical support, you can expect live, dedicated assistance from our team at our corporate headquarters. When you work with us, you make ONE call to someone who speaks your language and understands your needs. At every step of the equation, we’re here to ensure your success.

**ProcessPro On-Demand – Small/Mid-Sized Process Manufacturing ERP Software**

ProcessPro On-Demand is designed specifically for small to mid-size process manufacturers looking to manage business operations, accounting, and business intelligence real-time with minimal upfront costs, express implementation, continual support, and no ongoing maintenance. Monthly subscription fees include software, hardware, support, training, system maintenance, and upgrades. ProcessPro On-Demand’s cloud-based ERP system provides faster implementations in addition to flexibility to accommodate future growth and requirements for your batch process manufacturing company.
**Quick Facts**

**Address**
333 West Las Colinas Blvd
Suite 1650 East
Irving TX
75039

**Global offices**
Dallas, New York, Chicago, Sydney, Melbourne, Brisbane, Adelaide, Perth

**Product Lines**
Pronto Xi

**Add-On Modules**
Many Add-on modules available that can be added to the core ERP solution. Reporting/BI is embedded using Cognos. Base ERP foundation includes Sales & Distribution and Financials

**Vertical Specializations**
Automotive, Manufacturing, Chemicals, retail, Hardware, Utilities, Construction, Mining, Facilities Management, Services, Industrial Machinery, Wholesale

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**Quick Facts**

**Address**
3150 Brunswick Pike, Suite 130,
Lawrenceville New Jersey
08648

**Global offices**
India, Dubai, Singapore, Australia, London, Switzerland, US, South Africa

**Product Lines**
Ramco ERP, Aviation, Analytics, HCM, GRP, Product Strategy, Product Usability on Cloud

**Add-On Modules**
HCM and Analytics Add-on modules available through its Partner, Platform, System Integrators and Technology channel partners

**Vertical Specializations**
Discrete, Process, Mixed-Mode, ETO Manufacturing, Maintenance Repair & Overhaul (MRO, Equipment Rental, Aviation, Service Management, Utilities, Asset Management)
Quick Facts

**Address**
6561 Irvine Center Drive.
Irvine, CA
92618

**Global offices**
Offices throughout the U.S.A and the rest of world. A very large partner network in all parts of world.

<table>
<thead>
<tr>
<th>Organizational Fit</th>
</tr>
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<tbody>
<tr>
<td><strong>SMB</strong></td>
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<tr>
<td><strong>MEDIUM</strong></td>
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</table>

<table>
<thead>
<tr>
<th>Product Lines</th>
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<tbody>
<tr>
<td>Sage ERP X3, Version 6.5, Sage 100 ERP Online, Version 2013 formerly Sage ERP MAS 90 and 200), Sage 300 ERP Online, Version 2012 (formerly Sage ERP Accpac), Sage 500 ERP, Version 2013 (formerly MAS 500)</td>
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<table>
<thead>
<tr>
<th>Add-On Modules</th>
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<table>
<thead>
<tr>
<th>Vertical Specializations</th>
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</thead>
<tbody>
<tr>
<td>Accounting and Finance, Business and Resource Management, Human Resources and Payroll, Payment Processing, Construction and Real Estate, Accountants and Bookkeepers. The matrices cover functionality of all Sage products not just the cloud software.</td>
</tr>
</tbody>
</table>
Quick Facts

Address
SAP America, Inc. (US Headquarters)
3999 West Chester Pike
Newtown Square, PA 19073

Global offices
SAP AG (Global Headquarters)
Dietmar-Hopp-Allee 16
69190 Walldorf
For locations in over 130 countries worldwide. Extensive partner network

Organizational Fit

SMB
MEDIUM
ENTERPRISE

Product Lines
As the world leader in enterprise software, SAP helps companies of all sizes and industries run better. The subject of this profile is SAP Business One Cloud, one of the company’s ERP offerings for small businesses and subsidiaries of large enterprises.

Other ERP offerings from SAP include: SAP ERP, SAP Business All-in-One, SAP Business ByDesign, SAP Business One and SAP Business One Cloud

Add-On Modules
SAP has over 500 add-on modules available that cover both industry and business process functionality spanning all their verticals

Vertical Specializations

SAP Company Profile

As the market leader in enterprise application software, SAP helps companies of all sizes and industries run better. From back office to boardroom, warehouse to storefront, desktop to mobile device – SAP empowers people and organizations to work together more efficiently and use business insight more effectively to stay ahead of the competition. SAP applications and services enable more than 253,500 customers to operate profitably, adapt continuously, and grow sustainably.

From cloud and in-memory, to mobile, analytics, and beyond, we have solutions that enable small and medium enterprises and subsidiaries of large companies to use size to their advantage. One such offering in our portfolio is the SAP® Business One Cloud solution.
The solution offers an affordable way to manage your entire business. Designed specifically for small and midsize businesses and subsidiaries of large enterprises and sold exclusively through SAP partners, it helps you streamline processes, act on timely information, and drive profitable growth by providing a single, real-time source of business information.

SAP Business One Cloud delivers what you need to manage your most critical business functions. It enables you to standardize and streamline processes, minimizing errors and delays. Key areas of functionality include:

- **Accounting and finance**
  Streamline your financial operation – from accounting tasks to banking to financial reporting and analysis.

- **Sales and customer management**
  Manage the customer life cycle – from initial contact to final sale to after-sales service and support.

- **Purchasing and operations**
  Manage the complete order-to-pay cycle, including receipts, invoices, and returns.

- **Inventory and distribution**
  Manage inventory using various costing methods and gain insight into inbound and outbound shipments.

- **Reporting and administration**
  Generate timely and accurate reports based on company-wide data.

Because every business is different, SAP Business One Cloud is built with flexibility in mind. Whether you deploy the solution in your office or in the cloud, you can access it from the road using our SAP Business One mobile app. And as your needs change, you can adapt and extend the software with add-on solutions that fulfil industry-specific and other needs. In addition, we provide worldwide coverage with 41 local country versions in 27 languages, so you won’t outgrow your software solution as you expand your operations.

Worldwide, a wide range of trusted SAP partners offer the SAP Business One Cloud solution. This means that they host and manage the software, and they keep it updated so that you always have access to the very latest functionality. There’s no lengthy rollout, no requirement for time-consuming IT training, and no need for ongoing maintenance. So, you can get up and running quickly and with minimal disruption to your day-to-day operations. And, your IT staff is freed up to focus on other tasks.
With SAP Business One cloud, you can:

- Proactively grow your business by streamlining operations instead of reacting to the details of day-to-day tasks
- Respond quickly to customer needs by instantly accessing the information needed to make confident business decisions
- Eliminate redundant data entry and errors with a single, integrated solution that improves process efficiency, minimizes costs and delays, and strengthens your bottom line
- Form closer customer relationships by gaining access to centralized information that makes it easier to manage customer communication
- Choose the deployment option (in-house or cloud) and platform (SAP HANA or Microsoft SQL Server) that best meets your needs
- Lower technology costs and speed time to value with a solution that can be implemented more quickly, maintained more easily, and learned with minimal training
SYSPRO Company Profile

SYSPRO is a pioneering vendor of business software solutions and services, with a 35-year heritage of helping companies around the world compete and win. Operating in over 60 countries and backed by more than 1,500 accredited channel partners, SYSPRO provides enterprise resource planning (ERP) software to more than 15,000 licensed customers in industry sectors from manufacturing to financial services.

A privately held company, SYSPRO is based in Johannesburg, South Africa, and has regional offices in Australia, Canada, Singapore, South Africa, the United Kingdom and the United States.

SYSPRO is fully-integrated business software that provides complete control over the planning and management of all facets of business, including accounting, manufacturing and distribution operations in a variety of industries. The system’s modular approach allows companies to define how best to use SYSPRO technology to meet their exact requirements, and license only those components they need.

SYSPRO’s latest product release, SYSPRO 7.0, is one of the most comprehensive, single-source ERP solutions on the market, containing over a thousand new features and functions. With the range of functionality built into the product and accessible via a single SYSPRO portal, companies need never go outside of SYSPRO to gain increased operational effectiveness.
By adopting a single-source approach that does not require external applications to run the business, SYSPRO’s underlying structure and processes, as well as the look and feel, have remained the same, making it easy for people to learn new features of the software and to grow and progress with the product over the years.

SYSPRO is implemented and supported through a tightly integrated reseller and consultant network. This network embodies the company’s “Team SYSPRO” vision for providing highly skilled, in-market consulting and technical services to SYSPRO customers. The company cultivates its partner network with regular training, product updates, resources and business development support.

SYSPRO Business Live is the SYSPRO ERP solution packaged as an on-demand, cloud SaaS (Software as a Service) offering.

SYSPRO Business Live provides all the features of SYSPRO’s powerful, market-leading ERP solution, but removes the hassle of purchasing and maintaining hardware or managing an IT department.

SYSPRO software is priced according to the modules required and number of users, making it more widely accessible and adaptable to business needs. Product upgrades are included in the annual license fee (ALF).

SYSPRO ERP solutions are optimized for the following sectors:

<table>
<thead>
<tr>
<th>Aerospace</th>
<th>Machinery and equipment</th>
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</thead>
<tbody>
<tr>
<td>Automotive components and accessories</td>
<td>Medical devices</td>
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<tr>
<td>Chemicals and fertilizers</td>
<td>Metal Fabrication</td>
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<tr>
<td>Construction</td>
<td>Mining</td>
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<tr>
<td>Consumer durables</td>
<td>Pharmaceutical</td>
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<tr>
<td>Electronics</td>
<td>Plastics and rubber</td>
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<tr>
<td>Food and beverage</td>
<td>Wholesale suppliers and distributors</td>
</tr>
</tbody>
</table>
UNIT4 Company Profile

UNIT4 – Global Solutions for Business Living in Change

UNIT4 is a global business software company. It creates, provides and supports software for Businesses Living IN Change (BLINC) – delivered via the cloud or on-premise – to help these fast-changing "BLINC" organizations manage their business needs effectively. UNIT4 enables its customers to embrace business change – independently and in the most simple, quick and cost-effective way.

UNIT4 has customers all around the world, with operations in 26 countries across Europe, North America, Asia Pacific and Africa (as well as sales activities in several other countries) for easy, local access to service and support.

Quick Facts

Address
Stationspark 1000,
3364 DA Sliedrecht,
Netherlands

Global offices
Netherlands, Belgium UK, Ireland,
Norway, Denmark, Sweden, Germany,
Poland, Hungary, Czech rep. Italy,
France, Spain, Portugal, United States,
Canada, South Africa, Singapore
Malaysia, Indonesia, Eq. Guinea,

Product Lines
UNIT4 Business World, UNIT4 Financials, UNIT4 People Platform

Add-On Modules
UNIT4 Consolidation, UNIT4 Cashflow Planning, UNIT4 Business Analytics

Vertical Specializations

Private Sector Clients: Hogg Robinson, 3i, Adecco, Saab, Skanska, Securitas, Bravida, Mondial Assistance, Pathe Cinemas, Radio France and various national television providers.

Public Sector Clients: City of Oslo, City of Stockholm, Royal Borough of Windsor and Maidenhead, Parliaments of various countries, University of Gothenburg, Leeds Metropolitan University, Red Cross, Save the Children and Action against Hunger.
What is the UNIT4 advantage?

First of all: The underlying architecture of the Agresso ERP suite. Most ERP systems can be changed when your organization’s needs or structure change, but only the unique “Vita” architecture of UNIT4 Agresso enables end users to embrace most forms of business change themselves such as reorganizations, regulatory compliance, mergers and acquisitions, organizational growth or financial management driven change. The architecture smartly connects the three core areas of an ERP solution: the Data model, the Process model and the Delivery model (Reporting & Analytics). A change made in one of those areas automatically flows into the other areas, this without intervention from IT experts; simply, quickly and cost effectively. This effectively means that Agresso has 55% lower cost to maintain than alternative ERP solutions and beyond that it avoids major delays and severe disruption for every single business change that comes along after the initial implementation.

Unlike rival solutions, Agresso allows business users to modify their own systems, easily and quickly, long after implementation, without re-programming or IT involvement. As a result, instead of being tied to a rigid information system that hinders your growth, your staff are empowered to embrace change and make the difference, while at the same time dramatically reducing the spend and dependency on external resources. This is true agility, which goes beyond delivering a low total cost of ownership by ensuring customers benefit from something even more significant: a low total cost of change.

UNIT4 Agresso’s Multi-tenant cloud offering comes with options for individual organizations and for groups (UNIT4 Shared Journey). And unlike other vendors, an Agresso cloud deployment offers much more than just potential cost savings; it is also better in six important and concrete ways:

1. **Solution Portability** to a different cloud or even back on-premises
2. **Database Security** - via a unique data storage design
3. **Upgrade Elasticity** - offering flexibility to ‘pause’ and stay on a current release
4. **ERP Completeness** - complete end-to-end ERP for service-based industries
5. **Change Capable** - Ability to handle change in Business process, financial management, reorgs and restructures, mergers and acquisitions, GRC throughout the ERP system
6. **Disaster Forgiveness** - for those ‘oops’ moments where a quick data restore to the past hour is required
ERP Categorization

ERP systems are categorized into several dozen areas. Different systems such as manufacturing, distribution, services retail, and industry specific ERP systems exist as are many others. Customers should be cognizant of the type of industry they are in and the system type they require.

ERP categorization is segmented by industry as the overall category. That industry is then segmented by vertical and then system type. In the case of ERP which refers to the general term of enterprise resource planning it is further broken down by the types of ERP within the market segment in which a company resides.

Understanding how software vendors categorize their software and ERP systems can greatly simplify the software systems selection process. Often, many companies miscategorize the proper software required leading to the incorrect system type that the organization requires, causing an organizational misstep. Within the ERP space, further categorizations exist as in the case of manufacturing; where there are manufacturing categories such as discrete, mixed mode, process and engineer-to-order (ETO). In the case of services, further classifications as professional services, business process outsourcing, commercial real estate and construction are a few examples of sub categories within the services space. All of the industry types in the ERP Categorization chart all are part of the ERP category of software and are subsets of those industry specific solutions.
The following chart represents the types of systems that these solutions address. These categories represent a broad range of verticals and functionality that are considered base systems. This is high-level and a detailed selection process of the correct types of vendors and functionality should still be pursued by the organization. The solutions represented are not exclusive to what is listed here, in some cases these solutions address further system types, verticals and functionalities. This chart represents the SaaS solutions from these vendors.

**Figure 5. ERP System Type Categorization by Vendor**

<table>
<thead>
<tr>
<th>VENDOR</th>
<th>DISCRETE</th>
<th>MIXED MODE</th>
<th>PROCESS</th>
<th>PROJECT MFG</th>
<th>SERVICES</th>
<th>WHOLESALE DISTRIBUTION</th>
<th>HIGHER EDUCATION</th>
<th>NON-PROFIT</th>
<th>REAL ESTATE</th>
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</table>

PS - Refers to Partner Services Add-Ons
Solution Matrices
The following chart represents the range of functionality that these solutions offer. These categories represent a broad range and are considered base functionality from an enterprise perspective and how the cloud solutions address these market requirements. Whilst these are broad categories for organizations, they serve to assist in the selection process. Organizations will find that under these general categories multiple detailed industry and specific functionality will be discovered from different aspects of complexity by vendor. These functionalities are mostly dictated by the solutions target market. Usually a vendor who targets service-based companies will have a different set of core functionality than that of a manufacturing or distribution company. The figure below represents the components included within the monthly subscription of the software and its components. Organizations should examine each point and be mindful of which components are not covered as this will affect TCO and ROI in your calculations.

Figure 6. ERP Functionality by Vendor

See following chart
# Eval-Source - ERP Cloud and SaaS Buyer's Guide V.4

<table>
<thead>
<tr>
<th>VENDOR</th>
<th>Acumatica</th>
<th>Deltek</th>
<th>Epicor</th>
<th>Financial Force</th>
<th>Intacct</th>
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<td>ERP Functionality by Module</td>
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<td>Additional Modules</td>
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## Subscription Components

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<th>Are these components included in the monthly subscription</th>
<th>Hardware Costs</th>
<th>OS Licenses</th>
<th>Database Licenses</th>
<th>Middleware Licenses</th>
<th>Software Licenses (user counts)</th>
<th>Software Support</th>
<th>Hardware Maintenance</th>
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<th>IT Operations</th>
<th>Upgrades</th>
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<td>Epicor</td>
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<td>Strategic cloud partners</td>
<td>Windows Azure</td>
<td>Amazon Web Services</td>
<td>Latisys, Microsoft, Progress</td>
<td>CLD, BlueWolf, Centerstance, IKON</td>
<td>Cloud Partners available to extend the functionality to an ERP system. Many partners available for new varied functionalities. This ERP is built mostly by partner add-ons</td>
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<td>Y, Internal Wiki</td>
<td>Yes</td>
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<td>Y - Available through SFDC - Chatter</td>
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<td>Product name/ current version</td>
<td>Acumatica 5.0</td>
<td>Costpoint 7.1, Vison 7.3, Maconomy 2.2</td>
<td>Epicor 10 Express SaaS</td>
<td>Financial Force ERP</td>
<td>Intacct Cloud Accounting and Financial Software</td>
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<td>Solution cost/ billing cycle &amp; cost per additional user</td>
<td>License starts at $15K SaaS starts at $12K per year</td>
<td>$300-$1000 per user per year</td>
<td>Per Concurrent User, Monthly or Annual Billing</td>
<td>Fees vary by user type ranging from $25-$175 per Month</td>
<td>Starting at $400 per month</td>
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<td>All of the above</td>
<td>All of the above</td>
<td>All of the above</td>
<td>$25million - $25 Billion</td>
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<td>N/A</td>
<td>6000+</td>
<td>200+</td>
<td>Hundreds of thousands of users</td>
<td>Tens of Thousands of Entities are using Intacct</td>
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<td>Avg time to deploy (from scratch based on base ERP functionality)</td>
<td>1 Week to 4 Months</td>
<td>6 -12 Months</td>
<td>60 – 90 Days</td>
<td>3-6 months</td>
<td>4 -12 Weeks</td>
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<td>Database</td>
<td>MS SQL, Others</td>
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<td>SQL Server</td>
<td>Oracle/Force.com</td>
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<td>PLEX</td>
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<td>Strategic cloud partners</td>
<td>WatServ ERP Cloud Computing, SaaS Plaza, and others</td>
<td>SaaS Plaza, Data Resolutions, My Apps Anywhere</td>
<td>MS Certified Gold Business Partner, Multiple hardware and software partners depending on functionality required</td>
<td>Optimum Solutions, Maretics, Esha Research, Sage CRM, Highjump WMS, Lisam Systems, Unipoint</td>
<td>IBM</td>
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<td>Microsoft Dynamics AX 2013 R3</td>
<td>NetSuite OneWorld Netsuite CRM+ Suite Commerce</td>
<td>Plex Online - always current</td>
<td>Premier 10.5</td>
<td>Pronto Xi Dimensions rel 720</td>
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<td>Size of business served (small, medium, large all of the above)</td>
<td>50 Employees and more</td>
<td>SMB to Enterprise. Targeting Mid to Enterprise now</td>
<td>All of the above</td>
<td>All of the above</td>
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<td>Solution cost/ billing cycle &amp; cost per additional user</td>
<td>Solution cost is dependent on customer requirements. Setup fee + an on-going, monthly, per user per month cost</td>
<td>Basic - $2,250 per User</td>
<td>Monthly subscription starting at $2K/month. Enterprise license is unlimited users, including suppliers, subcontractors and customers. Includes software manitenance, hosting business continuity, sandbox.</td>
<td>Varies</td>
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<td>From days to several months depending on customer requirements</td>
<td>3 to 6 months</td>
<td>6 to 8 months</td>
<td>6 months</td>
<td>Dependent on level of process and design required</td>
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<td>Rackspace, Dell, Amazon</td>
<td>Microsoft Azure, Sage Managed Hosting (QTS)</td>
<td>Yes - Many partner channels and alliances</td>
<td>Microsoft Azure Others</td>
<td>Microsoft, VMWare, Cisco, HP</td>
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<td>Yes</td>
<td>Yes</td>
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<td>Ramco ERP on Cloud</td>
<td>Sage ERP X3, V6.5 Sage 100 ERP Online - V2013 (Formerly Sage ERP MAS 90, 200 MAS 500 ERP) Sage 300 ERP Online V2012 (Formerly Sage Accpac)</td>
<td>Version 9.0</td>
<td>SYSPRO 7.0</td>
<td>Business World - milestone 5</td>
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<td>All of the above</td>
<td>SMB to Medium</td>
<td>Small, Medium and subsidiaries of Large</td>
<td>All of the above</td>
<td>Medium to Large</td>
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<td>N/A</td>
<td>From $52 per user/month</td>
<td>SAP Business One Cloud is sold exclusively by SAP partners. Each partner has the flexibility to determine pricing to the end customer. Varies</td>
<td>Per user $199 month</td>
<td>Typically annual. Cost per additional user depends on the chosen modules. For a full ERP system with 500 users the subscription fee would be in the range of $40 - per user per month</td>
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</tr>
<tr>
<td>Number of SaaS Customers Worldwide</td>
<td>350-400</td>
<td>N/A</td>
<td>41500</td>
<td>N/A</td>
<td>245+</td>
<td></td>
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</tr>
<tr>
<td>Avg time to deploy (from scratch based on base ERP functionality)</td>
<td>1 Month and more</td>
<td>From days to several months</td>
<td>Varies weeks to months</td>
<td>3 to 6 months</td>
<td>3 to 6 months</td>
<td></td>
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<td></td>
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</tr>
<tr>
<td>Database</td>
<td>MS SQL</td>
<td>SQL, Oracle, Linux</td>
<td>SAP HANA &amp; MS SQL</td>
<td>MS SQL</td>
<td>SQL Server &amp; Oracle</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Vendor</td>
<td>Tenancy</td>
<td>Cloud Structure</td>
<td>Data Security by Vertical: HIPPA, SOX, SAS 70, 80 DSS, IFRS Capable</td>
<td>Encryption Type</td>
<td>Session Management</td>
<td>Application Level Security</td>
<td>How Is Data Separated From Other Clients</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Acumatica</td>
<td>Multi-tenant - SaaS &amp; Single - On-premise</td>
<td>Public/Private</td>
<td>GAAP/IFRS</td>
<td>SSL</td>
<td>Yes</td>
<td>Yes</td>
<td>Clients get their own application instance and database</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deltek</td>
<td>Single</td>
<td>Public powered by Amazon Web Services</td>
<td>OWASP Top 10</td>
<td>SSL and Encryption in transit</td>
<td>Yes</td>
<td>Yes</td>
<td>Each environment is virtualized specific for the client so no co-mingling of critical data takes place</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Epicor</td>
<td>Multi</td>
<td>Private Cloud managed by Epicor</td>
<td>Tier III, SAS 70 II certified</td>
<td>SSL w/128-bit encryption</td>
<td>Yes</td>
<td>Yes</td>
<td>Logical separation in the database with company unique identifiers</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Financial Force</td>
<td>Multi</td>
<td>Run on Force.com cloud, single login with Salesforce CRM &amp; sharing structure</td>
<td>SSAE 16/ SOC 1 Type II Report, HIPPA, Truste and ISO 27001</td>
<td>Connection to the Salesforce environment</td>
<td>Yes</td>
<td>Yes</td>
<td>Partitions created by Force.com platform</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Intacct</td>
<td>Multi</td>
<td>Private Cloud</td>
<td>SAS 70 Type II audited, SOP 97-2, 98-9, EITF 08-01, EITF 09-03</td>
<td>N/A</td>
<td>Yes</td>
<td>Yes</td>
<td>Multi-tenant database, and clients separated through tenant identification codes</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Microsoft</td>
<td>Single</td>
<td>Private Cloud</td>
<td>Various</td>
<td>SSL</td>
<td>Yes</td>
<td>Yes</td>
<td>Distinct ERP databases, distinct SQL Server instances</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Netsuite</td>
<td>Multi</td>
<td>Public</td>
<td>SAS 70 Type II, PCI DSS, EU-US Safe Harbour</td>
<td>128 Bit SSL</td>
<td>Yes</td>
<td>Yes</td>
<td>Netsuite Virtualization</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Plex</td>
<td>Single/Multi/Hybrid</td>
<td>Private</td>
<td>SSAE 16 Type 2</td>
<td>SSL V3 &amp; TLS V1</td>
<td>Yes</td>
<td>Yes</td>
<td>Virtualization, data separated by Plex Customer Number (PCN key)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tenancy</td>
<td>Cloud Structure</td>
<td>Data Security by Vertical: HIPPA, SOX, SAS 70, 80 DSS, IFRS Capable</td>
<td>Encryption Type</td>
<td>Session Management</td>
<td>Application Level Security</td>
<td>How Is Data Separated From Other clients</td>
<td></td>
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</tr>
<tr>
<td>Process Pro</td>
<td>Hybrid</td>
<td>Private, hosted and administered in our data center</td>
<td>N/A</td>
<td>Yes</td>
<td>Yes</td>
<td>Virtualization</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pronto Xi</td>
<td>Single</td>
<td>Managed private cloud</td>
<td>Supports IFRS standards GAAP</td>
<td>Yes</td>
<td>Yes</td>
<td>Each customer is on their own VM or connected to separate VLAN’s</td>
<td></td>
<td></td>
<td></td>
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<td></td>
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<tr>
<td>Ramco</td>
<td>Single/Multi/Hybrid</td>
<td>Private/Public</td>
<td>SAS 70, SAS 80, IFRS (All products)</td>
<td>Yes</td>
<td>Yes</td>
<td>Separated by servers or can be separate database instance for each customer</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sage</td>
<td>Multi</td>
<td>Private</td>
<td>SAS 70, IFRS</td>
<td>Yes</td>
<td>Yes</td>
<td>Database level security</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SAP</td>
<td>Multi</td>
<td>Partner option - Public &amp;/or Private depending on the customer</td>
<td>IFRS</td>
<td>N/A</td>
<td>Yes</td>
<td>Core ERP data/tenant data resides in separate databases. Windows active directory provides user authentication</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SYSPRO</td>
<td>Single</td>
<td>Private</td>
<td>ISO 27001</td>
<td>N/A</td>
<td>N/A</td>
<td>Data center, partition, server farm, virtualization</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>UNIT4</td>
<td>Multi/Hybrid</td>
<td>Private/Public</td>
<td>ISO/IEC 27001, ISO 14001, OHSA 18001, PCI DSS, &amp; SSAE16 Type 2</td>
<td>Yes</td>
<td>Yes</td>
<td>Each customer has own data store within multi-tenancy infrastructure - Customer has own db, application, information and process layers</td>
<td></td>
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</tr>
</tbody>
</table>
# Integration Components

<table>
<thead>
<tr>
<th>Application Customizable by User: Y/N</th>
<th>Database Customizable by User: Y/N</th>
<th>Business Processes Definable by Users: Y/N</th>
<th>Is There Storage Limit: Y/N, if so how is it charged?</th>
<th>Data Center Locations</th>
<th>Are there API’S Included, what kind or SDK’S</th>
<th>What Other Systems Can Integrate with Solution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acumatica</td>
<td>Yes</td>
<td>Yes</td>
<td>No for license &amp; Yes for SaaS (10GB base, expand in 10GB increments)</td>
<td>Hosted on MS Azure with 6 sites around the world</td>
<td>Acumatica SOAP API &amp; Acumatica SDK</td>
<td>Integration done through SOAP API</td>
</tr>
<tr>
<td>Deltek</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>Amazon Web Service Global Locations</td>
<td>Yes, Web service APIs</td>
<td>Any systems that want to share information via web APIs</td>
</tr>
<tr>
<td>Epicor</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Irvine, CA &amp; Denver CO</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Financial Force</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>East and West Coast US, Singapore, Japan, France, Germany and soon UK</td>
<td>Yes, Salesforce and FinancialForce API’s. A full development and customization environment, including mobile apps and we provide tools such as FinancialForce ClickLink</td>
<td>FinancialForce is embedded with Salesforce Sales and Service cloud. They share objects, reporting, dashboard, workflow, social and mobile applications.</td>
</tr>
<tr>
<td>Intacct</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>San Jose, Failover undisclosed location</td>
<td>Yes, complete web service API set to allow customization and integrating other business applications</td>
<td>N/A</td>
</tr>
<tr>
<td>Microsoft</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>Canada, US and more</td>
<td>Web Services</td>
<td>Microsoft Dynamics CRM, Microsoft Office, and more*</td>
</tr>
<tr>
<td>Netsuite</td>
<td>Yes – with limitations</td>
<td>Yes</td>
<td>Yes-Additional storage charged for an additional fee</td>
<td>2 Centers in the US</td>
<td>API’s and SDK available at additional costs</td>
<td>CRM, Inventory, Service, Supplier systems and much more. NetSuite publishes its pre-built integrations on SuiteApp.com</td>
</tr>
<tr>
<td>Integration Components</td>
<td>Application Customizable by User: Y/N</td>
<td>Database Customizable by User: Y/N</td>
<td>Business Processes Definable by Users: Y/N</td>
<td>Is There Storage Limit: Y/N, if so how is it charged?</td>
<td>Data Center Locations</td>
<td>Are there API’S Included, what kind or SDK’S</td>
</tr>
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</tr>
<tr>
<td><strong>Plex</strong></td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>Auburn Hills, MI</td>
<td>PLEX API &amp; SDK</td>
</tr>
<tr>
<td><strong>Process Pro</strong></td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>St. Cloud Minnesota</td>
<td>No</td>
</tr>
<tr>
<td><strong>Pronto Xi</strong></td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>Melbourne, Sydney</td>
<td>SDK available as an option</td>
</tr>
<tr>
<td><strong>Ramco</strong></td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes, part of subscription</td>
<td>US, Europe, Singapore</td>
<td>Integration through Web Services</td>
</tr>
<tr>
<td><strong>Sage</strong></td>
<td>Yes – with limitations</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Primary data center located in Atlanta, currently using Amazon for disaster recovery (Virginia)</td>
<td>SDK for Accpac available to development partners only. Not included for customers</td>
</tr>
<tr>
<td><strong>SAP</strong></td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Maybe in some cases storage limits may apply</td>
<td>Worldwide. Reselling partners may work the data center of their choice.</td>
<td>Yes - SDK is a set of APIs that allow for the customization and integration of the SAP Business One interface</td>
</tr>
<tr>
<td><strong>SYSPRO</strong></td>
<td>Yes</td>
<td>Yes</td>
<td>No, per GB</td>
<td>Philadelphia</td>
<td>SDK as part of application</td>
<td>Various Web-Services to enable interoperability with all key masterfiles</td>
</tr>
<tr>
<td><strong>UNIT4</strong></td>
<td>Yes</td>
<td>Yes (Information Layer)</td>
<td>No</td>
<td>Amsterdam, Wales (UK), Stockholm</td>
<td>Various Web-Services to enable interoperability with all key masterfiles</td>
<td>Various Web-Services to enable interoperability with all key masterfiles</td>
</tr>
<tr>
<td>Vendor</td>
<td>Mobile Capabilities</td>
<td>How long has your cloud solution been on the market</td>
<td>Vendor Uptime Rating</td>
<td>Offer Free Trials/Sandbox Testing</td>
<td>Offer Data Migration Services</td>
<td>Version Release Schedule</td>
</tr>
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</tr>
<tr>
<td>Acumatica</td>
<td>Yes</td>
<td>Since 2009</td>
<td>99.90%</td>
<td>Yes, by special permission only</td>
<td>Yes, offered by VAR partners</td>
<td>Biannually, hotfixes deployed as needed</td>
</tr>
<tr>
<td>Deltek</td>
<td>Yes</td>
<td>Since 2011</td>
<td>99.9%</td>
<td>Yes</td>
<td>Yes</td>
<td>Twice a year</td>
</tr>
<tr>
<td>Epicor</td>
<td>Yes</td>
<td>2 Years</td>
<td>99.5% or better</td>
<td>Yes</td>
<td>Yes</td>
<td>Minor updates monthly, major updates annually</td>
</tr>
<tr>
<td>Financial Force</td>
<td>Yes</td>
<td>Since 2009</td>
<td>99.99%</td>
<td>Yes</td>
<td>Yes</td>
<td>3 releases per year</td>
</tr>
<tr>
<td>Intacct</td>
<td>No</td>
<td>Since 2009</td>
<td>99.99 in CY 2010</td>
<td>Yes</td>
<td>Yes</td>
<td>Quarterly</td>
</tr>
<tr>
<td>Microsoft</td>
<td>Yes</td>
<td>Since 2002</td>
<td>99.90%</td>
<td>Yes</td>
<td>Yes</td>
<td>24-36 Months</td>
</tr>
<tr>
<td>Netsuite</td>
<td>Yes</td>
<td>Since 1998</td>
<td>99.95%</td>
<td>Yes</td>
<td>Yes</td>
<td>Every 6 Months</td>
</tr>
<tr>
<td>Plex</td>
<td>Yes</td>
<td>Since 2013</td>
<td>99.99%</td>
<td>No</td>
<td>Yes</td>
<td>Constantly enhanced</td>
</tr>
</tbody>
</table>
### Cloud Features

<table>
<thead>
<tr>
<th>Vendor</th>
<th>Mobile Capabilities</th>
<th>How long has your cloud solution been on the market</th>
<th>Vendor Uptime Rating</th>
<th>Offer Free Trials/Sandbox Testing</th>
<th>Offer Data Migration Services</th>
<th>Version Release Schedule</th>
<th>Offer Data Migration Services</th>
<th>Current Version released</th>
</tr>
</thead>
<tbody>
<tr>
<td>Process Pro</td>
<td>Yes</td>
<td>Since 2013</td>
<td>99.99%</td>
<td>No</td>
<td>Yes</td>
<td>Biannually</td>
<td>Yes</td>
<td>10.5</td>
</tr>
<tr>
<td>Pronto Xi</td>
<td>Yes</td>
<td>Since 2002</td>
<td>99.99%</td>
<td>To approved prospects only</td>
<td>Yes</td>
<td>Quarterly, minor patch releases, Major release every 2 years</td>
<td>Yes</td>
<td>Xi 710</td>
</tr>
<tr>
<td>Ramco</td>
<td>Yes</td>
<td>Since 2006</td>
<td>99.50%</td>
<td>Yes</td>
<td>Yes</td>
<td>Quarterly</td>
<td>Yes</td>
<td>3.0</td>
</tr>
<tr>
<td>Sage</td>
<td>Available soon</td>
<td>Since 2002</td>
<td>99.80%</td>
<td>No</td>
<td>Yes</td>
<td>Minor updates – Quarterly, Major updates annually</td>
<td>Yes</td>
<td>Sage 300 ERP online</td>
</tr>
<tr>
<td>SAP</td>
<td>Yes</td>
<td>Since 2012, B1 available for 12 years</td>
<td>99%</td>
<td>Yes, limited by Partner capabilities</td>
<td>Yes</td>
<td>Quarterly</td>
<td>Yes</td>
<td>SAP 9.1</td>
</tr>
<tr>
<td>SYSPRO</td>
<td>Yes</td>
<td>Since last year</td>
<td>99.80%</td>
<td>Yes</td>
<td>Yes</td>
<td>On-request, Monthly, Quarterly</td>
<td>Yes</td>
<td>SYSPRO 7.0</td>
</tr>
<tr>
<td>UNIT4</td>
<td>Yes</td>
<td>Since late 1990’s</td>
<td>99.90%</td>
<td>Free trials: No Sandbox testing: Yes</td>
<td>Yes</td>
<td>Updates every 3 months, Hotfixes as needed, Milestones once yr. Experience packs - quarterly (optional new functionality)</td>
<td>Yes</td>
<td>Business World – Milestone 5</td>
</tr>
</tbody>
</table>
## Total Cost of Ownership

<table>
<thead>
<tr>
<th></th>
<th>Acumatica</th>
<th>Deltek</th>
<th>EPICOR</th>
<th>FinancialForce.com</th>
<th>Intacct</th>
<th>Microsoft</th>
<th>NetSuite</th>
<th>PLEX</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Subscription terms</strong></td>
<td>Monthly, yearly</td>
<td>Yearly</td>
<td>Monthly, yearly</td>
<td>Yearly</td>
<td>Yearly</td>
<td>Per user, per month</td>
<td>Monthly, yearly</td>
<td>Monthly, yearly</td>
</tr>
<tr>
<td><strong>Business Continuity/Data Recovery</strong></td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
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<tr>
<td><strong>Maximum User count</strong></td>
<td>Unlimited</td>
<td>50,000</td>
<td>N/A</td>
<td>Unlimited</td>
<td>No practical limit</td>
<td>2250 concurrent users</td>
<td>N/A</td>
<td>Unlimited</td>
</tr>
<tr>
<td><strong>Minimum User count</strong></td>
<td>1, most user are 50-100 users</td>
<td>10</td>
<td>1</td>
<td>3+</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td><strong>Is there a set-up fee (Admin fee)</strong></td>
<td>No, but VARS charge for config, customizations, training &amp; data migration</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>Optional, yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Vendor Lock-in for data release</strong></td>
<td>No, clients own their data and can get it when they want</td>
<td>Yes</td>
<td>N/A</td>
<td>Oracle database of Force.com, data can be provided in many formats</td>
<td>Yes</td>
<td>No</td>
<td>N/A</td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Scalability (up/down grade capable)</strong></td>
<td>Up/down capable</td>
<td>Up/down capable</td>
<td>Up/down capable</td>
<td>Up/down capable</td>
<td>Up/down capable</td>
<td>Up/down capable</td>
<td>Up/down capable</td>
<td>Up/down capable</td>
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</tbody>
</table>
### Total cost of Ownership

<table>
<thead>
<tr>
<th>Feature</th>
<th>PROCESSPRO</th>
<th>PRONTO</th>
<th>Ramco</th>
<th>Sage</th>
<th>SAP</th>
<th>SYSPRO</th>
<th>UNIT4</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Subscription terms</strong></td>
<td>Monthly</td>
<td>Monthly, Yearly</td>
<td>Monthly, Yearly</td>
<td>Monthly</td>
<td>Monthly, subscription pricing with minimum 1 year contract</td>
<td>Monthly, Quarterly</td>
<td>Monthly, Yearly</td>
</tr>
<tr>
<td><strong>Business Continuity/Data Recovery</strong></td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Maximum User count</strong></td>
<td>50-75+</td>
<td>1000-2000 concurrent</td>
<td>Unlimited</td>
<td>Unlimited</td>
<td>Upto 150</td>
<td>999</td>
<td>10,000+ concurrent users on one customer site</td>
</tr>
<tr>
<td><strong>Minimum User count</strong></td>
<td>5</td>
<td>5</td>
<td>10</td>
<td>1</td>
<td>4</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td><strong>Is there a set-up fee (Admin fee)</strong></td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>Sometimes</td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Vendor Lock-in for data release</strong></td>
<td>Yes</td>
<td>No data is available as delimited text on customer exit</td>
<td>Yes</td>
<td>Customers own their data. A copy of their data they can obtain it any time</td>
<td>Customers own their data. A copy of their data they can obtain it any time</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td><strong>Scalability (up/down grade capable)</strong></td>
<td>Up/Down capable</td>
<td>Up/Down capable</td>
<td>Upgradeable or downgradeable by user. Minimum of 10 users</td>
<td>Up/Down capable</td>
<td>Up/Down capable</td>
<td>Up/Down capable</td>
<td>Up/Down capable</td>
</tr>
</tbody>
</table>
Enterprise Evaluation Services (End-to-end)
Eval-Source provides software evaluations services for companies to achieve greater ROI, avoid IT failure and achieve success in their IT initiatives. IT failure can be devastating to a company. Eval-Source has designed specific services to help your company avoid disruptive technology investments. Our range of services can assist your organization in any phase of the software evaluation process. We understand every organization is structured differently so we have created products and services to address all aspects of a software selection initiative. Our services range from Market Overviews to full enterprise software evaluation and even project management.

A la Carte Services
We offer partial evaluation process components to assist you with company's software selection. We understand not every organization needs an end-to-end process but assistance in particular areas of software evaluation. Whether resources are an issue or to supplement your team we can help. Any area of your evaluation where you may require additional assistance such as creating the RFI, vendor or project management, scoring, vendor demonstration script creation etc. We are available to supplement your team and to quickly decipher the mountains of information generated by the evaluation process.

Evaluation Project Plans
- Specifically designed to speed & facilitate software evaluation
- Plans consist of Milestones, objectives & evaluation techniques specific to software evaluation
- Project plans consider: size of team, solution size, project scope to deliver a timely & organized project

Requirements Gathering
- Our services provide structured methodologies for gathering requirements & categorizing your needs based on your specific priorities
- We translate your business processes and map your business requirements to vendor speak
- Assist in creation of functional, technical specifications with “Current” and “Future” functionality

RFI Creation & Vendor Management
- Our services create business based RFI’s that blends your IT and Business vision
- We business process map your requirements and align the proper solution to your business
- Our vendor management services provide structure to your evaluation process by managing the vendors, RFI delivery and scripting the demos

Scoring System
- Use of our proprietary scoring system that provides a “Percentage of best fit” within the overall evaluation including a TCO analysis
- Companies can evaluate software from their own methods and apply our scoring techniques to validate and provide auditable and quantifiable decision support
Market Research Overviews

- We provide market research and overviews of any enterprise software landscape – Great primer when starting an evaluation. *Reduces weeks and months from initial market research*
- This includes identification of vendors, target markets, verticals, system categorizations, solution and strategic sizing

Project Management and Recovery Services

- After the evaluation Eval-Source can manage the project to keep everything on track from both sides both organizational and vendor
- Our recovery services reconfigure and adjust the project plan to recover lost time, manage scope, budget, time and manage accountability
- Eval-Source also augments resourcing for organizations in a BA and PM capacity where in-house expertise may be limited

Benchmarking & Solution Validation

- Eval-Source can benchmark solutions based on organizational and industry best practices to compare competing solutions and measure them against your industry
- When narrowing down solutions Eval-Source can provide an assessment to validate the solution is capable of living up to marketing, industry and demo hype. We can also compare one solution to another and provide valuable insights, actionable, quantifiable and auditable results

Software Evaluation Training Course

- Our one of kind training course is the most comprehensive software evaluation training on the market
- Provides professor-led instruction of: writing a business plan, creating project budget, building an evaluation team, Build an RFI, vendor management techniques, create a scoring system, how to build and issue an RFI, creation of demo scripts, creation of project plans, project management techniques, sourcing techniques, complete with tools, templates, our proven software selection methodology and a multitude of helpful project management tips

Software Evaluation Toolkits

- Ideal for the Do It Yourselfer – Complete with templates, methodologies, project plans, business-based RFI

Software Evaluation Kits Benefits

- Achieve greater ROI on your software evaluation project
- Avoid costly IT failure in implementation
- Reduce the risk of selecting inappropriate software that does not comply to organization expectations
- Alignment of correct technology to organizational needs
- *Saves Time & Money*
- Provides auditable results and enhances accountability
- Business process-based RFI’s included
- Reduces market research time

*Available for all types of enterprise software – Cloud & On-premise*
About Eval-Source

Eval-Source is a consulting firm that provides enterprise software selection and management consulting services for organizations to achieve success in their IT initiatives. Our Tru-Eval selection system allows organizations to avoid IT failure, receive greater ROI and provide accurate decision support for enterprise software.

Our strategic consulting practice includes:

- Research & Market Overviews
- Vendor Reviews and SWOT Analysis
- System Readiness Assessments
- Requirements Gathering
- IT, Solution and App assessment and valuation
- Business Process Based- RFI's, A la Carte software evaluation services
- Software Evaluation Project Plans
- Project Recovery Services
- TCO & ROI Analysis
- Proof of Concept Planning
- Business Process Mapping
- Resource Augmentation
- Change Management Preparation

Eval-Source is an industry leader in the analysis of software technology and our thought leadership has placed us in the elite of consulting/analyst firms. As a result, we have been featured in over 150+ industry publications for our expertise ranging from ERP to cloud and SaaS consulting. As technology changes the need to understand your options and find the best fit for your organization is more important now than ever before. What sets us apart is our unbiased best in class consulting services that provide our clients with value, direction and success in selection, planning and optimization of their technology systems. Eval-Source provides the professional services that put your needs first and allows you to achieve success in your IT initiatives. We are the source for “getting it right” in IT procurement.

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