![Acumatica logo — The Cloud ERP]

ERP Usability Evaluation Checklist

Historically, ERP systems proved difficult to use, navigate, and maintain. Modern ERP applications overcame these shortcomings, improving the user experience with intuitive workflows and navigation. However, finding a system that provides the best experience for all users requires careful analysis.
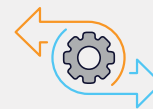
Use this checklist to compare features and benefits across four critical categories:

EASE OF USE AND NAVIGATION
How quickly and easily can users access pertinent information and processes? Look for ERP systems that provide easy access, simple navigation, and contextual help.

EASE OF TASK COMPLETION
How efficiently can users complete tasks while ensuring accuracy? What features empower users to complete activities in minimal steps while promoting collaboration and workflow transparency?

EASE OF ADMINISTRATION
Can you upgrade and maintain the ERP system without impacting other applications? Can IT staff modify the application without extensive programming?

EASE OF INTEGRATION/SCALABILITY
No ERP system delivers every function an organization will ever need out of the box. Can you easily extend the ERP software to accommodate more functions and scale to support new products, industry requirements, and users?

Get more help finding the ERP system best suited for your needs with the **ERP Comparison Checklist**.

Category 1: Ease of Use and Navigation

Feature	Benefit	Priority	Acumatica		
User-centric design	Navigate with ease. Configure and learn ERP applications with minimal training.		✓		
Platform neutrality/ Anytime, anywhere access	Access the ERP system from any browser or through mobile apps and a secured Internet connection.		✓		
Universal search	Find records and menu items throughout the system from a single search function.		✓		
Easy access to Help	Get immediate access to field-level, screen, and application help files with instructions and cross-references for related activities.		✓		
Personalized workspace	Tailor desktop and mobile menus, workspaces, favorite pages, and bookmarks.		✓		
Contextual side panels	Use expandable side panels to view related data without leaving screens.		✓		
Central database	Get complete, real-time information from a single source of truth.		✓		
Role-based dashboards	Get personalized real-time data and KPIs aligned to user roles and enforced by security profiles.		✓		
Multi-dimensional reporting with drill-down capability	Analyze data instantly via multiple filters and sort criteria. Drilldown to research sources.		✓		

Category 1: Ease of Use and Navigation *(Continued)*

Feature	Benefit	Priority	Acumatica		
Customizable wikis	Document and share business processes, policies, and knowledge with wikis to facilitate collaboration, knowledge sharing, and system adoption.		✔		
Proven usability with third-party validation	Choose an ERP system that is independently verified and rated for ease of use by existing customers and industry analysts, such as G2 Crowd, SoftwareReviews, Info-Tech Research Group, and Gartner Peer Insights.		✔		

Category 2: Ease of Task Completion

Feature	Benefit	Priority	Acumatica		
Connected and Holistic Business Application Suite	Work in a single, connected system and gain a 360-degree view of financials, payroll, customers, vendors, purchasing, commerce orders, inventory, and industry business processes for general businesses, construction, distribution, and manufacturing.		✔		
Multi-entity support	Work seamlessly with multiple companies and operations across the globe. Support financial consolidations, automated intercompany transactions, eliminations, and reconciliations.		✔		

Category 2: Ease of Task Completion *(Continued)*

Feature	Benefit	Priority	Acumatica		
Mobile framework	Work anywhere, anytime, on any device and browser. Leverage mobile access to: • Create and approve tasks, expenses, and timecards • Capture data with barcodes • Track team locations via GPS • Upload images and documents, including receipts • Modify PDFs, such as bills		✔		
Relational database	Get immediate access to real-time, accurate information via a single source of truth.		✔		
Automated processes	Automate processes, such as billing, approval processing, document management, and order fulfillment.		✔		
Configurable workflows	Set up and modify business process workflows to match the way you conduct business. Create business events for text or email alerts to manage your business by exception.		✔		
Push notifications	Get real-time alerts and emails automatically. Use business events to visualize orders, stock levels, and operational issues.		✔		
User-defined fields	Add data fields to security and business rules and workflows without programming.		✔		
PDF Annotator	Markup, edit, and sign PDFs in the field or on the job site using PDF Annotator and eSignature on the mobile app.		✔		
Speech recognition	Dictate notes into business records anytime, anywhere using the mobile app.		✔		

Category 3: Ease of Administration

Feature	Benefit	Priority	Acumatica		
Native, Modern Cloud with multiple tenant support	Simplify system administration with a wholly-contained application on a world-class hosting platform with best-in-class cybersecurity protection, automatic resource scalability, and automated back-ups.		✓		
Artificial Intelligence with Machine Learning	Improve data accuracy and minimize data entry with artificial intelligence with machine learning for accounts payable, expense management, and other crucial business processes.		✓		
Relational database	Store all data in a relational SQL database with advanced queries for reporting, business analytics, finances, audits, and more.		✓		
Customization Manager	Modify business logic without proprietary programming or compilers.		✓		
Visual Workflow Engine	Define and modify workflows visually by dragging and dropping elements to configure and automate business processes.		✓		
Visual Editor/ Visual Studio Templates	Customize the user interface or change business logic with embedded Visual Studio.		✓		
Bidirectional Sync Engine/ and Data Exchange services	Automate data imports and exports between the ERP application and external systems or data sources in batches or via scheduled migrations.		✓		
Multi-entity support	Support multi-company, multi-warehouse, and international organizations from a single platform.		✓		
Unlimited users	Add unlimited users for increased collaboration and growth without additional fees.		✓		

Category 3: Ease of Administration *(Continued)*

Feature	Benefit	Priority	Acumatica		
Flexible deployment options	Choose deployment options that best meet your needs with options to change them as needed: • Public Cloud • Private Cloud • Hybrid option: Host part of the solution on a private cloud and part on the public cloud.		✓		
Comprehensive support options	Access dual layers of support via certified consulting partners and ERP publisher support teams with free, 24-7 access to online support, and digital user community forums.		✓		

Category 4: Ease of Integration and Scalability

Feature	Benefit	Priority	Acumatica		
Open architecture with Web Services	Customize the ERP solution, including mobile applications and integrated applications with modern web hooks to connect data and processes with third-party applications or data sources.		✓		
Responsive Resource Scalability	The modern cloud platform automatically scales data processing resources for optimized system performance during peak work times.		✓		

Category 4: Ease of Integration and Scalability *(Continued)*

Feature	Benefit	Priority	Acumatica		
Global scalability	Support global business and security requirements with multiple base currencies, multi-currency conversions, GAAP or IFRS accounting standards, localized accounting, and tax features, multilingual software translations by the user, and flexible security for GDPR, PCI DSS, HIPPA, SOC, SSAE, and other compliance mandates.		✓		
Relational database	Store data on a relational SQL database for simplified connectivity to other business applications.		✓		
Industry-specific, native Integrations	Access seamless integrations to software used in construction, distribution, manufacturing, and retail and ecommerce industries.		✓		
Connected hardware via Device Hub	Manage hardware connections for credit card terminals, printers, barcode scanners, cash registers, machinery and equipment, and other hardware used with your ERP system.		✓		
Modern APIs	Leverage SOAP or REST APIs to connect people, information, processes, equipment, and ideas with modern technologies.		✓		
Low-code/no-code framework	Build and modify applications without programming using model-driven design, automatic code generation, and visual programming tools.		✓		
Import and export scenarios	Transfer data between systems seamlessly without coding.		✓		
ISV ecosystem	Extend the ERP system with hundreds of marketplace products including certified applications and plug-and-play extensions, such as advanced reporting, budgeting, human capital management, and specialized industry applications.		✓		
Vendor handles updates and upgrades	Eliminate the risk of missing an upgrade by choosing a cloud solution that's continually updated.		✓		

Acumatica
The Cloud ERP

Acumatica Cloud ERP is a comprehensive business management solution that was born in the cloud and built for more connected, collaborative ways of working. Designed explicitly to enable small and mid-market companies to thrive in today's digital economy, Acumatica's flexible solution, customer-friendly business practices, and industry-specific functionality help growing businesses adapt to fast-moving markets and take control of their future.

For more information on Acumatica, visit www.acumatica.com or follow us on LinkedIn.

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