MANUFACTURING MANAGEMENT SYSTEM EVALUATION CHECKLIST

Selecting an ERP manufacturing management and accounting system to run your business is a decision that will affect your company for many years. Many products offer the same or similar features, and it can be confusing to sort out what's important and what's not. This tool can help.

USE THIS CHECKLIST TO COMPARE THE FEATURES AND BENEFITS OF MANUFACTURING SYSTEM VENDORS ACROSS THESE FIVE CATEGORIES:

PRODUCTIVITY

What can the back-office product do to make you and your staff more productive?

FUNCTIONALITY

What features and functions does the product have that can perform your daily accounting and business management functions?

TECHNOLOGY

Does the product leverage the best technology for usability, customizability, and maintainability?

VALUE

How will the product maximize features and functions versus cost for the usable lifetime of the product?

RISK

How does the product minimize risk and facilitate both network and financial security?

CSB Technology

CS3 TECHNOLOGY OVERVIEW

CS3 Technology stands as a premier business technology consulting firm with over 25 years of experience in delivering transformative solutions. Our approach combines deep industry knowledge with hands-on expertise to help businesses achieve their full potential through technology.

OUR PROCESS

We follow a proven methodology that ensures successful implementations and lasting results:

- Comprehensive needs assessment and business process analysis
- Tailored solution design aligned with your business objectives
- Structured implementation with minimal disruption to operations
- Thorough training and knowledge transfer to your team
- Ongoing support and optimization services

SERVICE EXCELLENCE

Our commitment to exceptional service is reflected in:

- Dedicated account management and support teams
- Rapid response times and issue resolution
- Regular check-ins and performance reviews
- Proactive system monitoring and maintenance

CS3 Technology

MAXUP

THE MAXUP ADVANTAGE

MaxUP is CS3's signature approach to ensuring clients achieve maximum utilization of their software investments. This comprehensive program is designed to help organizations unlock the full potential of their business systems.

What MaxUP Means for You

- Continuous improvement through regular system optimization
- Access to best practices and industry expertise
- Regular training and skill enhancement opportunities
- Measurable ROI through enhanced system utilization
- Proactive identification of automation opportunities

Category 1: Productivity

Feature	Benefit	Priority	Acumatica		
Intuitive	Easy to learn and use.		✓		
True universal availability	Access to system from any device, anytime, anywhere to facilitate staff working on the road with customers and suppliers, and at home.		✓		
Multi-language	Work in the language that best fits you. Print documents (like invoices) in the language of your customer.		✓		
Multi-currency	Work in any currency and convert as needed.		✓		
Workflow	Automate business processes, approvals, and notifications.		✓		
Wiki's	Share information and company documents among any combination of teams, departments, and external users.		✓		
Document management	Make documents accessible to all key personnel.		✓		
Single database	Single version of the truth. No need to maintain integrations between applications.		✓		
Better, quicker decisions and fewer mistakes	Comprehensive reporting to make informed decisions without the guesswork.		✓		

Category 2: Functionality

Feature	Benefit	Priority	Acumatica		
Multi-entity	Support multi-company, multi-warehouse, and international companies, including financial consolidations, intercompany eliminations, and reconciliations.		✓		
Financial management	Support standard accounting functions, including General Ledger, Accounts Payable, Accounts Receivable, Cash Management, Tax management, and more.		✓		
Quote-to-cash	Create quotes, convert to sales order, check inventory availability, perform credit check, manufacturer, pick, ship, invoice, and collect payment.		✓		
Product structure control	Get control of bills of material (BOM), routings, engineering changes with rules-based product configuration and manufacturing estimating. Multiple levels of BOM for both engineering and costed views of the entire product structure.		✓		
Production planning	Create a master production schedule (MPS) from Rough-Cut Capacity Planning (RCCP) that plans production based on actual and forecasted orders. Schedule against finite capacity constraints with forward and backward scheduling methods to allow flexibility.		✓		
Material Requirements Planning (MRP)	Use MRP to create work orders and purchase orders based on the MPS. Track completions, work in process (WIP) and scrap. Eliminate reporting by backflushing labor or material when reporting the production quantity completed.		✓		

Category 2: Functionality

Feature	Benefit	Priority	Acumatica		
Inventory Management	Manage inventory, plan and manage movement of goods through distribution network, and control customer and transfer orders. Use multiple locations with lot and serial number tracking. Expired items are automatically removed from available inventory.		✓		
Automated transactions	Automate routine tasks of pick, pack, and ship with hands-free operations. Specify the types of items/transactions allowed, picking priority, and multiple bins and locations. Process material movement throughout the production process with barcode scanners.		✓		
Industry support	Support industry requirements on a single platform with embedded field service, project accounting, manufacturing, connected commerce storefronts, and native point of sale applications.		✓		
Product costing	Track costs, including material, labor, overhead, and outside operations. Analyze and report actual versus expected costs with variances. Use standard, average, specific (actual), or first-in-first-out costing valuation methods. Post costs to the general ledger.		✓		
Mixed-mode manufacturing support	Support specific industries including make to stock (MTS), make to order (MTO), engineer to order (ETO), job shop, project-centric, repetitive and batch process. Or a combination of them.		✓		
Procure-to-pay	Create requisitions, obtain approvals, convert to purchase order, receive inventory, receive invoice, match and pay.		✓		

Category 2: Functionality

Feature	Benefit	Priority	Acumatica		
Extensive marketplace	Access connected applications for extended functionality to meet your unique business needs, such as barcoding, electronic data interchange, shipping, advanced warehousing, or inventory optimization.		✓		
Integrated business intelligence	Go beyond spreadsheets and use integrated BI to understand what the financial and customer data is really telling you, so you can make informed, actionable decisions.		✓		
CRM combined with ERP	Share a single database between ERP and CRM – no need to synchronize two databases with the same information.		✓		

Category 3: Technology

Feature	Benefit	Priority	Acumatica		
True cloud	All functionality is accessible through the internet using a standard browser without the need for any software installation on the user's device. No additional software licensing required.		✓		

Category 3: Technology

Feature	Benefit	Priority	Acumatica		
Responsive design	View and interact with every page of the application on any device with a minimum of resizing, panning, or scrolling.		✓		
User interface	Modern look and feel. Customize screens and dashboards. Easy access to tasks with minimal clicks and intuitive workflow.		✓		
Customizable and flexible	Ability to modify and customize business logic to meet your company's unique requirements.		✓		
Customization using industry standard tools	Perform customizations using industry standard tools and programming languages without requiring the use of proprietary languages or compilers.		✓		
Full relational database	All system data stored in a relational SQL database. Query data for reporting, BI, financial statements, audits, and more.		✓		
Database export	Access and export relational versions of all data for reporting, backup, and transfer.		✓		
Upgrade on your schedule	Ability to plan upgrades at dates and times that are convenient to you and your company – not the ERP vendor.		✓		
Capable of moving to the cloud when you are ready	Not everyone wants to operate in the cloud. The product should support both on premise and cloud deployments, and let you switch deployment models if and when you are ready.		✓		

Category 4: Value

Feature	Benefit	Priority	Acumatica		
Low Total Cost of Ownership (TCO)	Reduce the total cost of ownership over the foreseeable lifetime of the product (at a minimum 3-5 years), including licensing, support, hardware, upgrade, and hosting costs. Be sure to add the cost of additional products required to run the system (web server, eCommerce platform, database server, collaboration tools, CRM, etc.), which includes all required hardware, licensing, and support costs.		✓		
Scale as you grow	Ability to accommodate heavier volumes, more resources, and more users as your business grows. Pay only for what you use. Add more resources when you need them.		✓		
Flexible licensing options	Offers subscription or perpetual licensing (depreciable capital expense versus an ongoing operating expense).		✓		
Multiple deployment options	Deployment methods allow on premise in your facility, private cloud of your choice, or our public cloud using Amazon Web Services (AWS).		✓		
Preserve capital for other business initiatives	Cloud deployments reduce the need for initial cash outlay for hardware and software purchases. Cloud deployments also reduce the amount of internal IT staff required for hardware and software support and maintenance.		✓		
Charged by resources used, not by user	Vendor charges for the resources used, not by user count, making the benefits of ERP available to all employees, customers and suppliers. Charging by user penalizes growing businesses.		✓		

Category 5: Risk

Feature	Benefit	Priority	Acumatica		
Predictable monthly costs	Not vulnerable to spikes in IT costs. Standardizing on a platform allows you to predict your monthly cost for the system.		✓		
Deploy quickly	Eliminate time delay and risk of unplanned costs by deploying quickly with a cloud solution.		✓		
Leverage global technology leaders	Ability to utilize the resources of cloud hosting leaders (Amazon, Microsoft, and IBM) for their fast response and uptime.		✓		
Knowledge of your industry	Reduce risk by using a software vendor with the solutions and knowledge for your specific industry.		✓		
Customer references	Cites customer successes using their software in your industry.		✓		
Best-in-class security at no additional cost	Support platform, web, and computer security leveraging expertise at hosting providers.		✓		
Data in the cloud	Data on your servers are vulnerable to attack.		✓		
Backup and disaster recovery	Prepared for the worst – cloud deployment lowers costs for backup, failover, and disaster recovery.		✓		
Simpler integration with other web apps	Utilize web capabilities to integrate with other web-based business applications.		✓		
Vendor handles updates and upgrades	Eliminate risk of missing an upgrade with a cloud solution.		✓		

BOUTIQUE SERVICE, ENTERPRISE CAPABILITIES.

We offer the perfect balance of personalized attention and enterprise-level expertise. Our boutique approach means you receive:

- DIRECT ACCESS TO SENIOR CONSULTANTS AND TECHNICAL EXPERTS
- CUSTOMIZED SOLUTIONS THAT FIT YOUR SPECIFIC BUSINESS NEEDS
- FLEXIBLE ENGAGEMENT MODELS THAT ADAPT TO YOUR REQUIREMENTS
- STRATEGIC GUIDANCE FOR LONG-TERM TECHNOLOGY PLANNING

Experience the difference of working with a partner who combines the personal touch of a boutique firm with the capabilities to handle enterprise-scale implementations. Our team's deep expertise in Acumatica and other enterprise solutions ensures you receive best-in-class service and support throughout your technology journey.

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