

Retail & Commerce ERP System Evaluation Checklist

Choosing the right retail and commerce ERP solution for your retail, wholesale, or manufacturing operations is a decision that will shape your company's future. With many products offering similar features, it can be challenging to determine what truly matters for your business.

This interactive checklist helps you compare features and benefits across five critical categories. Use it to evaluate which solution will help you build a more connected, collaborative, and profitable business.

Use this checklist to compare the features and benefits of ERP vendors across these five categories:



Productivity

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



Functionality

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



Technology

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



Value

How does the product maximize features and functions vs. cost for the usable lifetime of the product?



Risk

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

Productivity

Feature	Benefit	Priority	Acumatica		
Intuitive, Modern User Interface	Shorten the learning curve and navigate tasks quickly with software that's easy to learn and use. Speed up adoption rates across warehouse and sales staff with an attractive, modern UI.		✓		
Comprehensive Modules	Manage all your work in a single, connected application. Unite back-office finance, warehouse operations, and front-end sales channels to streamline processes and create one version of the truth.		✓		
Role-Based Access & Personalization	Empower every user by tailoring menus, screens, and data access to meet their specific needs. This ensures your sales clerks, warehouse managers, and accountants see exactly what they need to work effectively.		✓		
True Mobility for Warehouse & Store	Enable your team to access the system and critical data anytime, anywhere, on any device. Manage inventory, process orders, and check stock levels from the warehouse floor, pop-up store, or home office.		✓		
Intelligent Task Automation	Automate routine tasks such as order syncs, shipping notifications, and low-stock alerts. Reduce manual data entry to free up time for high-level activities that drive sales growth.		✓		
Comprehensive Reporting & Insights	Make faster, better decisions and eliminate guesswork with access to real-time, comprehensive data on sales performance, inventory turnover, and profitability by channel.		✓		
Unified Document Management	Ensure critical product data, vendor contracts, and shipping documents are current and available to all key personnel for improved collaboration.		✓		
Free Online Help and Support	Get your team up and running quickly with accessible, in-depth online help resources designed to answer questions and accelerate user adoption.		✓		
Multilingual Support	Operate across borders by working in your team's preferred language and printing customer-facing documents like invoices in the language of your customer.		✓		

Functionality

Feature	Benefit	Priority	Acumatica		
Omnichannel Sales Management	Manage your entire sales lifecycle in a single system, connecting direct sales with in-store POS, B2B/B2C commerce storefronts, and marketplaces like Amazon to ensure consistent customer experiences.		✓		
Real-Time Inventory Visibility	Gain clear visibility into stock levels across all locations—warehouses, retail stores, and 3PLs—with real-time updates that prevent stockouts and overselling.		✓		
POS for Retail, Counter, and Will-Call Sales	Streamline brick-and-mortar retail sales, counter sales, will-call pick-ups, and in-store returns and exchanges with native POS capabilities that sync sales transactions with your back-office accounting and order management platform.		✓		
Native Commerce Connectors	Seamlessly connect your accounting, inventory, and sales order systems with popular platforms like Shopify, BigCommerce, and others. Automatically sync products, inventory, customers, and orders between your web store and ERP app without manual entry.		✓		
Retail POS Hardware	Easily connect your POS and ERP app to retail hardware, including cash registers, receipt printers, barcode scanners, credit card terminals, and other devices.		✓		
Flexible Payments	Capture payments from online platforms, in-person transactions, phone orders, or self-service portals with ACH and credit card support. Streamline workflows with click-to-pay links, card readers, and automated reconciliation. Enhance cash flow, reduce errors, and boost customer loyalty with gift card management, recurring payments, and secure PCI-compliant processing.		✓		

Functionality (continued)

Feature	Benefit	Priority	 Acumatica		
Embedded CRM for Sales & Marketing	Leverage a single database to provide a complete view of customers. Track purchase history, manage marketing campaigns, and support loyalty programs without synchronizing multiple systems.		✓		
Advanced Warehouse Management (WMS)	Optimize picking, packing, and shipping processes with automated workflows. Use barcode scanning and wave picking to increase accuracy and speed up fulfillment.		✓		
Unified Financials & Multi-Entity Management	Gain complete control over core accounting, accounts payable and receivable, cash management, fixed assets, project accounting, and multi-currency operations. The system supports consolidations, regulatory compliance, intercompany transactions, and reporting for multiple companies, locations, and currencies, helping you achieve complete visibility and accuracy across your entire financials.		✓		
Automated Procurement & Vendor Collaboration	Automate complex procurement workflows based on sales forecasts and reorder points. Simplify collaboration with suppliers through an integrated vendor portal.		✓		
Flexible Order Management	Orchestrate orders from multiple channels efficiently. Handle complex scenarios like split shipments, drop-ships, and buy online, pick up in-store (BOPIS) with ease.		✓		
Advanced BI and Retail Analytics	Leverage native analytics to identify dead stock, potential stock-out scenarios, sales trends, margins, and other inventory, purchasing, and sales analytics with tailored, role-based dashboards and flexible inquiries and reports with drill-downs to source transactions. Use AI to generate data-driven insights and spot anomalies for actionable operational decisions.		✓		

Technology

Feature	Benefit	Priority	Acumatica		
True Cloud	With seamless scalability, real-time access, and lower IT costs, a true cloud ERP solution gives users flexibility and improved collaboration across distributed teams and locations.		✓		
Flexible Deployment	Deploy in a public cloud, a private cloud, or on-premises. You have the freedom to choose the model that best fits your business needs today and the ability to switch anytime it makes sense for your future.		✓		
Customizable & Flexible Platform	Tailor your solution to your exact retail processes without requiring a team of developers. Modify workflows, create custom reports, and adapt screens using intuitive, industry-standard tools.		✓		
Open Architecture & Seamless Integrations	Connect all your essential business applications into one unified system. Leverage open APIs to easily integrate with specialized retail software, ensuring seamless data flow across your entire operation.		✓		
Powerful and Reliable Database	Trust that your system can handle your growth. All data is stored in a high-performance relational SQL database, giving you full access to query and export information for reporting, auditing, or backups.		✓		
Continual Improvements	Regular software releases continually enhance the existing platform with the latest retail technology and features.		✓		
Upgrades on Your Schedule	Plan and execute system upgrades at dates and times that are most convenient for your business, avoiding peak sales seasons, not dictated by the software vendor.		✓		

Value

Feature	Benefit	Priority	Acumatica		
Low Total Cost of Ownership (TCO)	Reduce long-term product costs, including licensing, hardware, upgrades, and hosting. Eliminate the need for separate servers and maintenance for multiple siloed systems.		✓		
Intelligent Automation	Empower your team to do more with less by automating routine order processing and inventory tasks. This helps keep staffing costs down and frees up your employees to focus on customer service and growth.		✓		
Scalability to Grow without Added Cost	Accommodate heavier transaction volumes, new product lines, and more users as your business grows without compromising performance during peak seasons.		✓		
Resource-Based Licensing	Pay only for the computing resources you use, not for the number of users. This unique model makes it affordable to give every employee, from the warehouse to the front counter, access to the system.		✓		
Flexible Licensing Options	Select between subscription or perpetual licensing (ongoing operating expense versus a depreciable capital expense).		✓		
Free, On-Demand Training	Get your team up to speed quickly and maximize your investment without incurring additional training costs. Access a comprehensive library of online courses to ensure everyone can use the system effectively.		✓		
Preserve Capital	Reduce initial cash outlay for hardware and software with a cloud deployment, freeing up capital for inventory purchasing and other business initiatives.		✓		

Risk

Feature	Benefit	Priority	 Acumatica		
Enhanced Security & PCI Compliance	Leverage best-in-class security at no extra cost. Protect sensitive customer and payment data with robust security measures that support PCI compliance standards.		✓		
Predictable Costs	Avoid spikes in IT costs. Standardizing on a platform lets you predict your monthly system costs, even as transaction volumes fluctuate.		✓		
Quick Deployment	Eliminate time delays and the risk of unplanned costs by deploying quickly with a cloud solution and getting your products to market faster.		✓		
Robust Backup & Disaster Recovery	Protect your company's critical sales and inventory data with automated backup, failover, and disaster recovery services managed by global technology leaders.		✓		
Best-in-Class Security at No Additional Cost	Support platform, web, and computer security leveraging expertise at hosting providers to safeguard against cyber threats.		✓		
Data in the Cloud	Avoid storing your data on your own servers, as they are more vulnerable to physical damage or local attacks.		✓		
Seamless Integrations & Upgrades	Use modern web capabilities to easily integrate with other business applications and eliminate the risk of missing an update with a solution that's continually improved.		✓		

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](#).

