

ERP Cloud and SaaS Buyer's Guide

Version 3



Eval-Source

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Version 3

In Collaboration with



Where serious technology buyers decide

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 muddled 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.

TABLE OF CONTENTS

Section 1:

Market Overview

Cloud & SaaS trends

Definitions

ERP Specific Definitions

Section 2:

Vendor Profiles

ERP Categorization

- Acumatica
- Epicor
- Financial Force
- Intacct
- NetSuite
- Microsoft AX
- Plex Systems
- Process Pro
- Pronto Xi
- Ramco
- Sage
- SAP
- SYSPRO
- UNIT 4

Section 3:

Solution Matrices

- ERP functionality by module
- Subscription Components
- Vendor Overviews
- Security
- Integration
- TCO
- Cloud Components

Section 4:

- Case Studies: EPICOR, PROCESSPRO, UNIT4,
- About Us, Privacy policy

ERP Cloud and SaaS Market Overview

The estimated dollar value of the cloud and SaaS market varies widely by consulting and analyst firms alike. The main undercurrent common 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 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.

IDC estimates the size of the public cloud market for products and services was \$16B in 2010 and projects it to grow to \$56B by 2014. With recent cloud spending and the plethora of additional cloud services the number may be revised. This signifies that the market spending for cloud will become 3.5 times its current size. These numbers seem to be in line with Eval-Source's estimates for the cloud computing market. Eval-Source estimates the size of the cloud market will grow to \$63B by 2014.

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 other markets now have dedicated ERP software which was not available from a year ago. 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 functionality. 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.

The Services based ERP market has evolved significantly as traditional vendors have extended functionality for these industries. ERP for service-based industries has formed its own market with established vendors from the space to best of breed point solutions. This guide focuses on vendors who offer services as part of its ERP system or vendors who are strictly services based.

Cloud Computing and SaaS 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.

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.

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.

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.

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.

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.

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.

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 and replenishment 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.

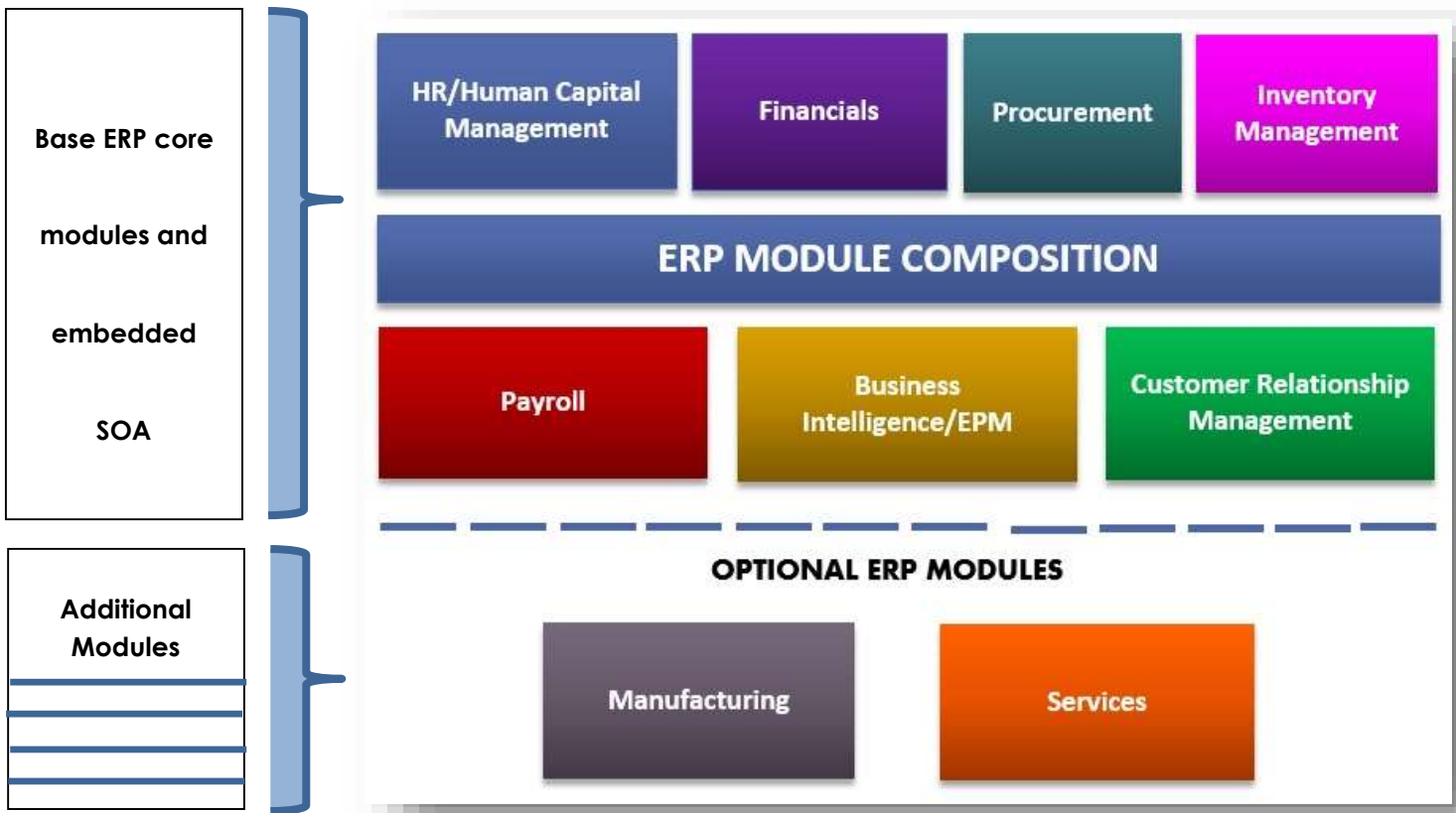
Procurement

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.

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
22102

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

Wholesale distribution, Software, Telecom and hosting, Manufacturing, Non-profit, Retail, Engineering, Real-estate/Property Management, Franchises, Transportation, Government (US and UK, Entertainment and recreation, Engineering, Real-estate/Property Management, Franchises, Transportation, Government (US and UK, Entertainment and recreation



Epicor Profile

Website: www.epicor.com

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.

Product Lines

Epicor Express. While Epicor carries a complete line of enterprise software solutions, this guide specifically covers its SaaS delivery model, Epicor Express.

Add-On Modules

Epicor Express Ecommerce

Vertical Specializations

Manufacturing, Distribution

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 Profile

Website: www.financialforce.com

Quick Facts

Corporate HQ

595 Market St.
Suite 2700
San Francisco, CA 94105
United States

Global Offices

EMEA Headquarters

Cardale Park
Beckwith Head Road
Harrogate, North Yorkshire
HG3 1RY, UK

Spain, Ontario, Canada

Product Lines

FinancialForce ERP

Add-On Modules

All of these applications can be implemented individually or collectively. Financial Management, Supply Chain Management, Human Capital Management, Professional Services Automation, Supply Chain, CPQ, Contracts, Revenue Recognition

Vertical Specializations

Distribution, Services, Financials, Helpdesk/Service Management through Salesforce.com

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

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

Atlanta, Austin, Chicago, Denver,
Las Vegas, New York, Oklahoma
City

Global Offices

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

Product Lines

NetSuite ERP, NetSuite OneWorld, NetSuite Suite Commerce,
NetSuite Services Resource Planning, NetSuite TribeHR, Business
Intelligence

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

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



Process Pro Profile

Website: www.processproerp.com

Quick Facts

Address

3290 33rd Street South

Saint Cloud, MN

56301

800.457.3548

info@processproerp.com

Product Lines

Process Pro Premier 10.4

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 ERI 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



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

Product Lines

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)

Add-On Modules

Sage Intelligence – Financial Reporting, Sage Payment Solutions – Sage Exchange, Project Manufacturing Management, Warehouse Management, Sage Electronic Document Management, Sage Electronic Document Delivery, Project and Job Cost, Sage Inventory Advisor, Sage Sales Tax, Sage Shipping

Vertical Specializations

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.



SAP Profile

Website: www.sap/businessone.com

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

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

Aerospace & Defense, Automotive, Banking, Chemicals, Consumer Products, Defense & Security, Engineering, Construction & Operations, Healthcare, Higher Education & Research, High Tech, Industrial Machinery, Components, Insurance, Life Sciences, Media, Mill Products, Mining, Oil & Gas, Professional Services, Public Sector, Retail, Sports & Entertainment, Telecommunications, Travel & Transportation, Utilities, Wholesale Distribution

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 Profile

Website: www.syspro.com

Quick Facts

Address

959 South Coast Drive, Suite 100,
Costa Mesa, California,
92626, USA

Global offices

Africa, APAC, Canada, UK and
Europe. Many more available
through the extensive partner
channel.

Product Lines

SYSPRO 7.0 available as both on-premise and hosted model

Add-On Modules

Document Management, Payroll, Quality, Shipping, EDI,
Document Management, Quality Management, Warehouse
Management

Vertical Specializations

Manufacturing, Medical Devices, Electronics, Food, Consumer
Packed Goods, Equipment Manufacturing, Plastics

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:

- ❖ **Aerospace**
- ❖ **Automotive components and accessories**
- ❖ **Chemicals and fertilizers**
- ❖ **Construction**
- ❖ **Consumer durables**
- ❖ **Electronics**
- ❖ **Food and beverage**
- ❖ **Machinery and equipment**
- ❖ **Medical devices**
- ❖ **Metal Fabrication**
- ❖ **Mining**
- ❖ **Pharmaceutical**
- ❖ **Plastics and rubber**
- ❖ **Wholesale suppliers and distributors**



UNIT4 Profile

Website: www.unit4.com

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, Australia

Product Lines

Agresso Business World

Add-On Modules

UNIT4 Consolidation, UNIT4 Cashflow Planning, UNIT4 Business Analytics

Vertical Specializations

Local Government, Central Government, Higher Education, Not for Profit, Health, Professional Service, Financial Service, IT Services, Architecture, Construction and Engineering (AEC), Technical research, Real Estate, Business Services, Utilities/Energy

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.

UNIT 4 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.

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.

Figure 4. ERP Categorization



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

	Discrete	Mixed Mode	Process	ETO	Services	Distribution	Higher Education	Non - Profit
Acumatica	✓	✗	✗	✓	✓	✓	✗	✗
EPICOR Business Inspired™	✓	✓	✗	✓	✓	✓	✗	✗
FINANCIAL FORCE-COM ERP at Customer Speed™	✗	✗	✗	✗	✓	✓	✗	✓
Intacct.	✗	✗	✗	✗	✓	✓	✗	✗
Microsoft Dynamics	✓	✓	✓	✓	✓	✓	✓	✓
NETSUITE	✓	✗	✗	✓	✓	✓	✓	✓
PLEX	✓	✓	✓	✓	✗	✓	✗	✗
PROCESS PRO	✗	✗	✓	✗	✗	✗	✗	✗
PRONTO SOFTWARE	✓	✓	✓	✓	✓	✓	✗	✗
ramco	✓	✓	✓	✓	✓	✓	✗	✗
sage	✓	✓	✓	✓	✓	✓	✗	✗
SYSPRO™ Simplifying your Success	✓	✓	✓	✓	✓	✓	✗	✗
SAP	✓	✓ Yes - PS	✓ Yes - PS	✓ Yes - PS	✓	✓	✓	✓
UNIT4 BUSINESS SOFTWARE	✗	✗	✗	✗	✓	✓	✓	✓

PS - Refers to Partner Services Add-Ons

Solution Matrices

A photograph of a business meeting. Several people in suits are gathered around a glass table. In the foreground, a person's hand is holding a pen and pointing at a bar chart on a document held on a blue clipboard. Other people in the background are also looking at documents and holding pens, suggesting a collaborative review or presentation.

ERP Functionality by Module

Subscription Components

Vendor Overview

Security

Integration

Total Cost of Ownership

Cloud Features

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.

Figure 6. ERP Functionality by Vendor

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.

VENDOR	Acumatica	Epicor	Financial Force	Intacct	Microsoft AX	Netsuite	Plex	Process Pro	Pronto Xi	Ramco	Sage	SAP B1	SYSPRO	UNIT4
ERP Functionality by Module														
Financials	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔
Payroll	Third Party	✔	✘	✘	✔	✔	✘	✔	Australia Only	✔	✔	✔ (IPS)	✘	✔
Human Capital Management (HCM/HR)	✘	✔	✔	✘	✔	✔	✔	✔	✔	✔	✔	✔	✘	✔
Inventory Control	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔
CRM/SFA	✔	✔	✔ SFDC	✘	✔	✔	✔	✔	✔	✔	✔	✔	✔	✘
Procurement	✔	✔	✔	✘	✔	✔	✔	✘	✔	✔	✔	✔	✔	✔
BI/EPM	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔
Mixed-Mode Manufacturing	✔	✔	✘	✘	✔	✘	✔	✘	✔	✔	✔	✔ (IPS)	✔	✘
Process Manufacturing	✘	✘	✘	✘	✔	✘	✔	✔	✔	✔	✔	✔ (IPS)	✔	✘
Discrete Manufacturing	✔	✔	✘	✘	✔	✔	✔	✘	✔	✔	✔	✔	✔	✘
Engineered - to - Order (ETO)	✔	✔	✘	✘	✔	✘	✔	✘	✔	✔	✔	✔ (IPS)	✔	✘
Retail	Third Party	✘	✘	✘	✔	✔	✘	✘	✔	✘	✘	✔ (IPS)	✔	✘
Professional and Public Services	✔	✔	✔	✘	✔	✔	✘	✘	✔	✔	✔	✔	✔	✔
Project Management	✔	✔	✔	✘	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔
Time and Billing	✔	✔	✔	✘	✔	✔	✔	✘	✔	✔	✔	✔ (IPS)	✘	✔
Approvals Management	✔	✔	✔	✘	✔	✔	✔	✘	✔	✔	✔	✔	✔	✔
Delivery Management	✘	✘	✔	✘	✘	✔	✔	✘	✔	✘	✔	✔	✔	✘
Helpdesk & IT Services	✘	✔	✔ SFDC	✘	✔	✔	✘	✘	✔	✔	✔	✔	✔	✘
Practice Management	✘	✘	✔	✘	✘	✔	✘	✘	✘	✔	✔	✔	✘	✘
Additional Modules			Integrates to SFDC					See Profile		All Sage Products		(IPS) Integrated Partner Solutions	EDI, Quality, Document, WMS	








Figure 7. Subscription Components

Are these components included in the monthly subscription?	Acumatica	Epicor	Financial Force	Intacct	Microsoft	Netsuite	Plex	Process Pro	Pronto Xi	Ramco	Sage	SAP	SYSPRO	UNIT 4
Hardware costs	Yes	Yes	Yes	N/A	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
OS licenses	Yes	Yes	Yes	N/A	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Database licenses	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Middleware licenses	N/A	Yes	Yes	N/A	Yes	Yes	Yes	Yes	N/A	Yes	Yes	Yes	Yes	Yes
Software licenses (user counts)	Yes	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Software support	By VAR	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes
Hardware maintenance	Yes	Yes	Yes	N/A	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Software maintenance	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
IT operations	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Upgrades	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Training provided	No - but available	No - but available	Yes	Yes	No - but available	No - but available	Yes	Yes	No - but available	Yes	No - but available	No - but available	No - but available	No - but available

Eval-Source - ERP Cloud and SaaS Buyer's Guide V.3

The next section of charts represents overall vendor components that should be investigated further to determine the full commitment price of the total solution. These charts cover components of the solution, vendor characteristics and points that need to be properly evaluated when selecting software. Since the charts are lengthy, we have separated them into two parts. The first five vendors, then the second set of six.

Figure 8. Vendor Overview – See the next 2 pages

OVERVIEW CRITERIA	 Acumatica	 EPICOR Business Inspired™	 FINANCIAL FORCE.COM ERP of Customer Speed	 Intacct.	 MicroSoft	 NETSUITE	 PLEX
Strategic Cloud Partners	Windows Azure	Latisys, Microsoft, Progress	CLD, BlueWolf, Centerstance, IKON	Cloud Partners available to extend the functionality to an ERP system	WatServ ERP Cloud Computing, SaaS Plaza, and others.	SaaS Plaza Data Resolutions My Apps Anywhere	Advanced Systems & Design Axis Communications Barracuda networks Cisco CLI Drobbo Datto Dell Fortinet HP Intermec Juniper Networks MS Certified Gold Business Partner Motorola Symantec UnyPOS Zebra
Do you offer fixed bid implementations (Y or N)	N	Y	N	Y	Y	Y	Y
Is on-premise available (Y or N)	Y	Y	N	N	Y	Y	N
Ability to move to on-premises	Y	Y	N	N	Y	Y	N
Social networking capabilities (Y,N)	Y, Internal Wiki	Y	Y - Available through SFDC - Chatter	N	Y (ISV Solution)	Y	N
Product name/ current version	Acumatica 4.3	Epicor ERP 10 SaaS	FinancialForce ERP	Intacct Cloud Accounting and Financial Software	Microsoft Dynamics AX 2013 R3	NetSuite OneWorld Netsuite CRM+ Suite Commerce	Plex Online - always current
Size of business served (small, medium, large all of the above)	All of the above	All of the Above	\$25million - \$25 Billion	SMB	50 Employees and more	SMB	All of the above
Solution cost/ billing cycle & cost per additional user	License starts at \$15,000 SaaS starts at \$12,000 year	Per Concurrent User, Monthly or Annual Billing	Fees vary by user type ranging from \$25- \$175 Month	Starting at \$400 per month	Solution cost is dependent on customer requirements. Setup fee + an on-going, monthly, per user per month cost. Additional cost per user varies by solution.	Basic - \$2,250 per User	Monthly subscription, starting at \$2K/month. Enterprise license is unlimited users, including suppliers, subcontractors and customers. Includes software maintenance, hosting business continuity, sandox. Contact plex at (888) 454-7539
Number of SaaS Customers Worldwide	N/A	200+	Hundreds of thousands of users	Tens of Thousands of Entities are using Intacct	N/A	12,000+	1, 200
Avg time to deploy (from scratch based on base ERP functionality)	1 week to 4 months	60 - 90 business days	3-6 months	4 - 12 weeks	From days to several months depending on customer requirements	3-6 Months	6-8 Months
Database	MS SQL, Others	SQL Server	Oracle/Force.com	Oracle	Microsoft SQL Server	MS SQL Server, Oracle	SaaS/Cloud

Vendor Overview Continued






OVERVIEW CRITERIA							
Strategic Cloud Partners	Optimum Solutions, Maetrics, Esha Research, Sage CRM, Highjump WMS, Lisam Systems Unipoint	IBM	Rackspace Dell Amazon	Microsoft Azure Sage Managed Hosting (QTS)	Yes - Many partner channels and alliances	Microsoft Azure Others	Microsoft VMWare Cisco HP
Do you offer fixed bid implementations (Y or N)	Y	N	Y	N	Y	Y	Y
Is on-premise available (Y or N)	Y	Y	Y	Y	Y	Y	Y
Ability to move to on-premises	Y	Y	Y	Y	Y	Y	Y
Social networking capabilities (Y,N)	N	N	Y	Y	Y	Y	Y
Product name/ current version	Premier 10.4	Pronto XI Dimensions rel 700.4	Ramco ERP on Cloud	Sage ERP X3, V6.5 Sage 100 ERP Online - V2013 (Formerly Sage ERP MAS 90 and MAS 200 & MAS 500 ERP) Sage 300 ERP Online V2012 (Formerly Sage Accpac)	Version 9.0	SYSPRO 7.0	Agresso - Milestone 4
Size of business served (small, medium, large all of the above)	All of the above	SMB and above	All of the above	All of the above	Small, Medium and subsidiaries of Large	All of the above	Medium to Large
Solution cost/ billing cycle & cost per additional user	Varies	Negotiable	N/A	From \$52 per user/month	SAP Business One Cloud is sold exclusively by SAP partners. Each partner has the flexibility to determine pricing to the end customer. Prices may be influenced by local market conditions. In most cases, the billing is monthly. There are generally price differences depending on the user's product access. For example, a professional user would cost more than a user with access to CRM only	Per user \$199 month	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
Number of SaaS Customers Worldwide	2	100	350-400	N/A	41 500+	5%	235
Avg time to deploy (from scratch based on base ERP functionality)	6 months	Dependent on level of process and design required	1 Month	From days to several months depending on product and customer requirements	Deployment times vary based on number of users and complexity of the project. On average, a basic implementation with a few users takes approximately 2 weeks	3 to 6 months	3 to 6 months
Database	.NET - some legacy	IBM Informix	MS SQL	SQL, Oracle, Linux	SAP HANA & Microsoft SQL	MS - SQL	SQL Server and Oracle

Figure 9. Security Components

	Acumatica	Epicor	Financial Force	Intacct	Microsoft	Netsuite	Plex Online	Process Pro	Pronto Xi	Ramco	Sage	SAP B1	SYSPRO	UNIT4
Tenancy:	Multi-tenant - SaaS & Single - On-premise	Multi	Multi	Multi	Single	Multi	Single/Multi/ Hybrid	Hybrid	Single	Single, Multi, Hybrid	Multi	Multi	Single	Multi/Hybrid
Cloud Structure:	Private/Public	Private Cloud managed by Epicor	Run on Force.com cloud, single login with Salesforce CRM & sharing the same reporting, dashboarding, mobile, social and workflow tools	Private Cloud	Private Cloud	Public	Private	Private, hosted and administered in our data center	Managed Private Cloud	Private/Public	Private	Partner option - Public &/or Private depending on the customer	Private	Private/Public
Data Security by Vertical: HIPPA, SOX, SAS 70, 80 DSS, IFRS Capable	GAAP, IFRS	Tier III, SAS 70 II certified	SSAE 16/ SOC 1 Type II Report, HIPPA, Truste and ISO 27001	SAS 70 Type II audited, SOP 97-2, 98-9, EITF 08-01, EITF 09-03	Various	SAS 70 Type II, PCI DSS, EU-US Safe Harbour	SSAE 16 Type 2	N/A	Supports IFRS standards GAAP	SAS 70, SAS 80, IFRS (All products)	SAS 70, IFRS	IFRS	ISO 27001	ISO/IEC 27001, ISO 14001, OHSAS 18001, PCI DSS, & SSAE16 Type 2
Encryption Type:	SSL	SSL w/128-bit encryption	Connection to the Salesforce environment is via SSL 3.0/TLS 1.0	N/A	SSL*	128-bit SSL	SSL V3 & TLS V1	ESP: 3DES/HMAC SHAI (VPN)	AES, SSLv3/SSH over the wire encryption	128-bit SSL	128-bit SSL	N/A	N/A	PCI-DSS + AES 256 Encrypted
Session Management:	Yes	Yes	Yes	Yes	Yes*	Yes	Yes	Yes	Yes	Yes	Yes	Yes	N/A	Yes
Application Level Security:	Yes	Yes	Yes	Yes	Yes*	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
How Is Data Separated From Other clients	Clients get their own application instance and database	Logical separation in the database with company unique identifiers	Partitions created by Force.com platform	Multi-tenant database, and clients separated through tenant identification codes	Distinct ERP databases, distinct SQL Server instances*	NetSuite - Virtualization	Virtualization, data separated by Plex Customer Number (PCN key)	Virtualization	Each customer is on their own VM or connected to separate VLAN's	Seperated by servers or can be separate database instance for each customer	Database level security	Core ERP data/tenant data resides in separate databases. Windows active directory provides user authentication	Data center, partition, server farm, virtualization	Each customer has own data store within multi-tenancy infrastructure - Customer has own db, application, information and process layers

Figure 10. Integration Components

	Acumatica	Epicor	Financial Force	Intacct	Microsoft	Netsuite	Plex	Process Pro	Pronto Xi	Ramco	Sage	SAP B1	SYSPRO	UNIT4
Application Customizable by User: Y/N	Yes	Yes	Yes	Yes	Yes*	Yes	Yes	Yes	Yes	Yes	Yes - with limitations	Yes	Yes	Yes
Database Customizable by User: Y/N	Yes	Yes	Yes	Yes	Yes*	Yes - with limitations	Yes	No	Yes	Yes	No	Yes	Yes	Yes (information layer)
Business Processes Definable by Users: Y/N	Yes	Yes	Yes	Yes	Yes*	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes	Yes
Is There Storage Limit: Y/N, If so how is it charged ?	No for license & Yes for SaaS (10GB base, expand in 10GB increments)	Yes	Yes	Yes, if the user exceeds a maximum per user capacity set at 15GB	No	Yes- Additional storage charged for an additional fee	No	No	No	Yes, charged as part of subscription	No database storage limit	Maybe – in some cases storage limits will apply	No, per GB	No
Data Center Locations	Hosted on MS Azure with 6 sites around the world	Irvine, CA & Denver CO	East and West Coast US, Singapore, Japan, France, Germany and soon UK	San Jose, Failover undisclosed location	Canada, Us and more*	2 centers in the US	Auburn Hills, MI Ashville, NC	St. Cloud Minnesota	Melbourne, Sydney	US, Europe, Singapore	Primary data center located in Atlanta, currently using Amazon for disaster recovery (Virginia).	Worldwide. Reselling partners may work the data center of their choice.	Philadelphia	Amsterdam, Wales (UK), Stockholm
Are there API'S Included, what kind or SDK'S	Acumatica SOAP API & Acumatica SDK	N/A	Yes, Salesforce and FinancialForce API's. A full development and customization environment, including mobile apps and we provide tools such as FinancialForce ClickLink	Yes, complete web service API set to allow customization and integrating other business applications	Web Services	API's and SDK available at additional costs	PLEX API & SDK	No	SDK available as an option	Integration through Web Services	SDK for Accpac available to development partners only. Not included for customers	Yes - SDK is a set of APIs that allow for the customization and integration of the SAP Business One interface	SDK as part of application	Various Web-Services to enable interoperability with all key masterfiles
What Other Systems Can Integrate with Solution	Integration done through SOAP API	N/A	FinancialForce is embedded with Salesforce Sales and Service cloud. They share objects, reporting, dashboard, workflow, social and mobile applications.	N/A	Microsoft Dynamics CRM, Microsoft Office, and more*	CRM, Inventory, Service, Supplier systems and much more. NetSuite publishes its pre-built integrations on SuiteApp.com	CRM, QMS, PLC, CAD, EDI, Payroll, Print management, barcode devices, budget & planning, shipping solutions, tax reporting, and fiscal compliance	CRM, Quality Management, Payroll, Labeling	Any type of enterprise systems	All types through Web Services	CRM, Asset Management, Print Management, EFT Processing, Inter- Entity transactions, Procurement, Service & Maintenance Management	SAP Business One Integrates with SAP & third party systems, other software packages, Microsoft Office, Crystal Reports, BI, ecommerce, mobile and social solutions.	Document Management, Budgeting & Planning, Quality Management, Tax Reporting, CRM, EDI, Advanced Financial Reporting, Shipping Solutions	Various: POS, CRM, third party HR, leasing applications, third party logistics applications, PM tools, market-places, etc.

Figure 11.

Total Cost of Ownership

	Acumatica	Epicor	Financial Force	Intacct	Microsoft	Netsuite	Plex	Process Pro	Pronto Xi	Ramco	Sage	SAP	SYSPRO	UNIT4
Subscription Terms:	Monthly & Yearly	Monthly & Yearly	Yearly	Yearly	Per user, per month	Monthly & Annual	Monthly, Yearly	Monthly	Monthly & Yearly	Monthly & Yearly	Monthly, No minimum	Monthly, subscription pricing with minimum 1 year contract	Monthly, Quarterly	Monthly, Yearly
Business Continuity/Data Recovery	Yes	Yes	Yes	Yes, with data center fail-over	Yes*	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Maximum User Capacity	Unlimited	N/A	Unlimited	No practical limit	2250 concurrent users	NA	Unlimited	50 - 75+	1000-2000 concurrent	Unlimited	Unlimited	Upto 150	999	10,000+ concurrent users on one customer
Minimum User Limit	1, most users are 50-100	1 user	3+	1 user	No limit	1	1	5	5	10	1	A starter package for SAP B1 Cloud is available for companies with between 1-5 users.	4	10
Is There a Setup Fee(Admin Fee)	No, but VARS charge for config, customizations, training & data migration	Yes	No	Optional, yes	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	Sometimes	Yes
Vendor Lock-in for Data Release	No, clients own their data and can get it when they want	N/A	Oracle database of Force.com, data can be provided in many formats	Yes	No	NA	Yes	Yes	No. Data is available as delimited text on customer exit	Yes	Customers own their data. If customer requests a copy of their data they can obtain it any time	Customers own their data. If customer requests a copy of their data they can obtain it any time	No	No
Scalability	No for license, Yes for SaaS (10GB base, expand in 10GB increments)	Yes	Yes, upgradeable or downgradeable based on concurrent user count	Yes	Yes	Yes	Yes	Yes, upgradeable or downgradeable based on concurrent user count	Yes, upgradeable or downgradeable based on concurrent user count	Upgradeable or downgradeable by user. Minimum of 10 users	Yes. In regards to both for adding users or downgrading if necessary	Yes	Yes	Yes, upgradeable and downgradeable

Figure 12.

Cloud Features

	Acumatica	Epicor	Financial Force	Intacct	Microsoft	Netsuite	Plex	Process Pro	Pronto Xi	Ramco	Sage	SAP B1	SYSPRO	UNIT 4
Mobile Capabilities	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	Yes	Available soon	Yes, the SAP B1 mobile app is available for Android and iOS. Blackberry and other platforms are supported by SAP Business One partners	Yes	Yes
How long has your cloud solution been on the market	Since 2009	2 Years	Since 2009	Since 1999	Since 2002	Since 1998	Since 2001	Jul-13	Since 2002	Since 2006	Since 2002	Since 2012, B1 available for 12 years	Since last year	Since Late 1990's
Vendor Uptime Rating	99.90%	99.5% or better	99.99%	99.992% in CY 2010	99.90%	99.95%	99.90%	99.99%	99.99%	99.50%	99.80%	> 99%, Assume some downtime for upgrades 3 times a year	99.80%	99.90%
Offer Free Trials/Sandbox Testing	Yes, by special permission only	Yes	Yes	Yes	Yes	Yes	Yes	No	To approved prospects only	Yes	No	Yes, limited by partner capabilities	Yes	Free trials No. Sandbox, Testing Yes
Offer Data Migration Services	Yes, offered by VAR partners	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Version Release Schedule	Biannually, hotfixes deployed as needed	Minor updates monthly, major updates annually	3 Releases per year	Quarterly	24-36 Months	Every 6 Months	Constantly enhanced	Biannually	Quarterly, minor patch releases. Major release every 2 years	Quarterly	Minor updates quarterly, major updates Annually	Quarterly	On-request - Monthly, Quarterly	Software updates every 3 Months, Hotfixes as needed. Milestones 1 time per 12 months. Experience packs quarterly (optional new functionality)
Current Version released	3.0	Always current	10	N/A	Dynamics 2012 AX R3	Netsuite 2012.2	Always current	10.4	700.4	3.0	Sage 300 ERP online	Current version 9.0	SYSPRO 7.0	Agresso - Milestone 4

A blurred background image of three business professionals in a modern office setting. In the foreground, a desk is covered with various business charts, including bar graphs and pie charts, along with a blue folder and a black pen. The overall scene is bright and professional.

Case Studies

Epicor

- Chirch Global Manufacturing

Process Pro

- Hamford Research, Inc.

- Primrose Candy Company

Unit 4

Sodertorn University

Chirch Global Looks to Cloud ERP to support its Worldwide Operations



Success Highlights

Challenges and Opportunities

- Leverage an on-demand SaaS model to deliver all the benefits of a common ERP backbone to coordinate operations around the globe and facilitate information sharing, ensure compliance with quality standards and best practices, and support cost savings, operational efficiencies and future growth, with minimal IT overhead

Epicor Solution and Services

- Epicor Express

Why Epicor?

- A complete end-to-end ERP solution provided in the SaaS model, Epicor Express delivers broad functionality, particularly for the specific needs of contract manufacturers, job shops and small to midsize businesses

Benefits

- Better competitive advantage via strategic use of offshore manufacturing managed under a coordinated, quality umbrella
- Improved operational visibility, agility and responsiveness to more effectively navigate the changing landscape of manufacturing operations
- Improved supplier and subcontractor management, supporting global lean manufacturing and Just-in-Time inventory management initiatives, and more strategic preventative maintenance and scheduling contributing to greater uptime

Company Facts

- Location: McHenry, Illinois
- Industry: Metal fabrication and stamping
- Number of Locations: One manufacturing facility in the US, supported by China resources
- Web site: www.chirchmfg.com



“We wanted the most current and future looking technology, and Epicor, with its roots in contract manufacturing applications, as well its strong Software-as-a-Service ERP solution, was a great fit.”

Anthony L. Chirchirillo, CEO of Chirch Global

Since the mid-90s, manufacturing has become exceedingly globally competitive. Many US-based manufacturers have looked to outsource work to China, often achieving a lower cost basis but often with a loss in overall quality. The residual effect of this trend has been a loss of jobs and an erosion of America's manufacturing base.

But Chirch Global Manufacturing is an example of a manufacturer applying ingenuity and technology to support a new hybrid onshore/offshore manufacturing model that is fundamentally changing the game for the advantage of its customers/business partners, while keeping its US manufacturing base intact.

A family owned business, Chirch Global was started by Anthony L. Chirchirillo in 2002. The company offers cost-effective precision metal fabrication, stamping, progressive die tooling, and sub-assemblies manufactured in Northern Illinois and China. The company is ISO/TS 16949 certified. Chirch stamps precision parts for all industries using materials from .004-inch to .375-inch thick. Services include: rapid prototyping, fabrications, stampings, assemblies, machining, tool design and build, specialty packaging, and global sourcing. Industries served include: appliance, automotive, cellular, communications, consumer, computer, electrical, electronic, environmental, medical, shelving and military.

Staring Down the Competition

A few years ago, Chirch was looking at a very dire scenario – how to compete with offshore job shops whose landed price was often less than the company's cost. The company knew it needed to adopt a global perspective to be able to compete globally, but wasn't prepared to give up on its US manufacturing operations. By embracing the lower labor costs of a Chinese workforce for progressive die tooling, Chirch knew it could establish a more competitive cost structure that would help keep work – and production jobs – in its US manufacturing facility.

In 2008, Chirch acquired a precision metal stamping company based in McHenry, Ill. However, it also acquired antiquated information systems lacking both documentation and user manuals. Chirch knew technology was key to making its hybrid onshore/offshore business model fly and provide the agility and responsiveness needed, but it couldn't afford expensive technology deployments or costly in-house IT resources.

At a time when many manufacturers were timid regarding adoption of cloud-based, virtualized solutions, Chirch adopted a first-mover visionary position, leveraging an on-demand cloud-based enterprise resource planning (ERP) solution to support the ability to access information anywhere to support seamless global 24/7 operations. Seeking to standardize on the most current and future-looking technology platform, it moved to the Epicor Manufacturing Express Edition (Epicor Express) platform in late 2009.

A complete end-to-end ERP solution provided in the Software-as-a-Service (SaaS) model, Epicor Express delivers broad functionality, particularly for the specific needs of contract manufacturers, job shops and small to midsize businesses. It is priced affordably with a deployment model that minimizes complexity. In order to maximize the benefits of the cloud, Epicor Express runs on a multi-tenant, shared database environment via a single application instance.

"We wanted the most current and future looking technology," said Anthony L. Chirchirillo, CEO of Chirch Global, "and Epicor, with its roots in contract manufacturing applications, as well as its strong Software-as-a-Service ERP solution, was a great fit."

Orchestrating Global Operations with Epicor Express

The Epicor Express solution has enabled Chirch to coordinate and orchestrate its global supply chain and operations, and ensure quality and compliance in accordance with ISO/TS

16949 quality standards. It also supports operational visibility and transparency so that Chirch can effectively navigate the

"changing landscape" of manufacturing operations to prevent line shut downs.

The company has also been able to implement more strategic preventative maintenance and scheduling, which has contributed to greater uptime. In the past, scheduling at Chirch was extremely labor intensive and required a lot of upkeep. Upon the beginning of a job, a job router would often place a die in a press, only to realize that the tool needed sharpening. They would then have to break down the set up for the requisite maintenance before starting the job. With the new system, the job router now queries the system, which automatically splits the job into two separate (but vital) schedules: a production and die maintenance schedule. For example, a tool that is to be used in production will not be set up in the press until its production status has been reviewed and verified by Chirch's team of tool and die professionals to prevent foreseeable quality issues or manufacturing inefficiencies. The result of this improves productivity through more strategic maintenance scheduling. All maintenance activities are now logged and managed in the system. Chirch can see exactly what maintenance has been done on a tool and even be proactive in telling customers when it's time for maintenance or how many hits are left on a machine before service.

The Epicor Express deployment has given Chirch the ability to better manage and monitor its supplier and subcontractor efforts and support its lean manufacturing and Just-in-Time inventory management initiatives. Once the system was in place, Chirch realized that many of its suppliers were over-shipping product, and as a result, Chirch was sitting on too much inventory – in stark contrast to its lean Just-in-Time manufacturing system goals. A policy of only being able to accept less than 10 percent overage helped curb bloated shipments, and electronic purchase orders helped ensure no paperwork fell through the cracks.

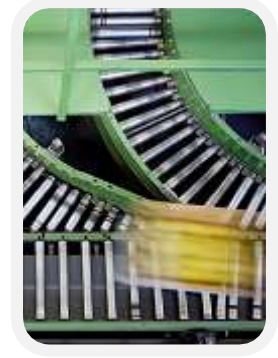
What's more, improved information access has empowered Chirch's employees, giving them more confidence in their decision making. From monitors across the shop floor, they can view all the following: open sales orders, due dates, quantities, finished and on-hand inventory, and ship location. They can also view material purchase orders, so if the required material is not on hand, they can see when it is due to arrive. If the material for a specific job is not arriving for another day or two, the shop can move to the next job in line so a machine doesn't stand idle for days

Realizing Rapid ROI

As a result of the company's new global business model and its investment in Epicor Express, Chirchirillo says the company has made a quantum leap – and cites several metrics that underscore this statement.

Return on Equity (EBITDA/Equity) exceeded 50% in 2010. With regard to top line growth, sales revenues increased by 17% from 2009 to 2010, and Chirch saw the addition of new customers in new industries, diversifying the company's customer base. The company also saw gains in employee productivity; the number of Full Time Employees (FTEs) was reduced by 31% from 2009 to 2010, while concurrently driving top line revenue growth and throughput.

These outstanding results demonstrate how Chirch is succeeding in its goal of helping its customers “compete with anyone ... anywhere in the world,” in bringing customers a winning combination of globally competitive prices; access to Chinese resources to support US manufacturing expansion; local customer service, distribution and Just-in-Time delivery, with adherence to the highest quality standards.



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Case Study - Hampford Research, Inc.

Software: ProcessPro Premier 10.18

Challenge

HRI was previously operating on a homegrown system that was difficult to maintain and didn't allow for any upgrades. With a lack of real-time data and complete visibility to all manufacturing operations, they weren't able to judge on a daily basis what was happening within the company - everything from inventory status to warehouse management to simple financial reporting - there was always an information delay.

Solution

HRI implemented ProcessPro Premier in 2011, a fully integrated and industry specific ERP solution that seized the ability to grow along with their company. Approximately a year after their initial implementation, they added additional features including Project Accounting, Material Safety Data Sheet (MSDS) and Automated Warehouse Solution (AWS), to further streamline their processes and improve operational efficiencies.

Software Add-on Applications

- AWS
- Project Management
- MSDS

Results

Real-Time Inventory

Unable to easily and efficiently track its inventory levels, HRI desired to maintain accurate inventory levels in a real-time environment. Now with the ability to observe its manufacturing process across the board, HRI has access to live inventory updates and on-hand, allocated, and projected inventory levels by combining batch tickets, sales orders, purchase orders, and current inventory levels.



Client Profile

Hampford Research, Inc. (HRI) is a custom chemical manufacturer that was established in 1982 as a manufacturer specializing in photochemicals and radiation cured monomers. HRI has expanded the industries it serves care, dental, printing and imaging, optical lens and curable adhesives and coating industries

"ProcessPro's support team is very helpful and patient no matter what issues or concerns we have.

I appreciate that ProcessPro listens to their clients and utilizes their feedback in future product improvements."

**Angel Fekete
Finance Manager
Hampford Research, Inc.**



Case Study - Hampford Research, Inc.



Visibility

Each manufacturing department now has complete visibility of its partnering areas. By sharing reports in ProcessPro's Business Intelligence Suite (BI), team members are able to make informed business decisions regarding scheduling, lot tracking, inventory, and sales.

Streamline Processes

HRI has been able to streamline their processes and reduce operational costs. They've eliminated dual recording of a majority of their inventory transactions, cut down on paperwork clutter, and removed the frustration of delayed data at month's end closeouts.

Reporting and Data Analysis

Utilization of BI provides a familiar reporting environment that has enabled HRI to retrieve, analyze, and share critical business information allowing them to make better informed, timelier, and knowledgeable business decisions. The interactive dashboard provides direct drill-down capabilities to transactions, the ability to export data to Microsoft® Excel, and allows for posting of informational reports to HRI's entire organization.

Future

HRI is committed to continuing investment in ProcessPro Premier. HRI anticipates that they will be implementing Material Requirements Planning (MRP) to help them maintain adequate amounts of raw materials for scheduling timely batch production in the near future.

Benefit Overview

- Real Time Inventory
- Visibility
- Streamline Processes
- Reporting and Data Analysis

Contact ProcessPro today:

info@ProcessProERP.com
www.ProcessProERP.com
800.457.3548



Food Industry



Case Study – Primrose Candy Company

Software: ProcessPro Premier 10.3

Challenge

Primrose was previously using antiquated methods of tracking business operations in multiple sources on various systems. Data management was entered manually requiring duplicate entry of data and increased opportunity of errors. Primrose desired real-time financial and inventory control information that would alert them when inventory was low and what items were needed to fulfill orders. The company was experiencing an increasing need for quality control measures, a scheduling system that coincided within one system and a sound formula storage system.

Solution

Primrose implemented ProcessPro Premier 10.18 in late 2009, a fully integrated and industry specific ERP solution that afforded the company the ability to track real-time inventory, create production schedules and quality control. Since then, Primrose has continued to meet its growing demands with adding additional features and performing necessary upgrades. They have been an excellent partner for beta testing of numerous future version releases.

Software Add-on Applications

- Automated warehouse solution (AWS)
- Business Intelligence
- CRM
- Dock Scheduling
- Advanced Scheduler

Results

Real-Time Inventory

Primrose's hardship in being unable to effectively track inventory levels throughout the production process without pulling manual paperwork, created a necessity for a real-time physical inventory solution. ProcessPro enables Primrose to maintain accurate, manageable inventory, reducing waste and lag time. They have experienced a great improvement in operational efficiency through the use of AWS, which provides virtually error free inventory transactions via handheld scanners.



Client Profile

Primrose Candy Company was founded by Frank and Mae Puch in 1928. Primrose manufactures primarily hard and chewy candies, such as caramel, salt water taffy and popcorn confections. Primrose also produces private label nutraceuticals. With over 80% of the business being derived from private label and contract manufacturing. Primrose has met its own high standards but also the scrutiny of those who put their name on the final products.

"ProcessPro has been a great improvement for us. It was easy to implement and train! Most of the data could be imported and our implementation team at ProcessPro was super helpful, guiding us step by step. Seeing how we do things now with ProcessPro, I can't even imagine how we got by before we had it"

Michelle Puch - Controller



Case Study – Primrose Candy Company



All Inclusive System

Primrose recognized the value in a fully integrated system that was all inclusive. They previously utilized Microsoft® Excel for scheduling and storage of formulas and were utilizing a third party module for their accounting needs. ProcessPro offered them a complete system, an accounting package, warehouse management, R&D, MRP, and more. ProcessPro provided a sound and secure formula storage option aiding to consistency in quality.

Production Scheduling

With the dynamic of Primrose's manufacturing process they required a flexible scheduling system that had the ability to handle different machines, shapes, and sizes of production. ProcessPro Premier's Advanced Scheduler feature has allotted for Primrose to schedule a batch for multiple days and multiple routes. They have experienced a dramatic reduction in work flow and shipping errors.

User Friendly

ProcessPro provided a system that Primrose could use out of the box without major modifications, which was a major concern for them when in the initial sales cycle. They were also concerned on the "user friendly" capabilities of ProcessPro, as they kept in mind that their staff would need to adjust to the change. Primrose's staff has been pleased with the painless transition, accessibility of support staff, and the Doc's on Disk series that allows a user to view solutions while working in the system.

Future

Primrose is committed to continuing its investment in ProcessPro Premier. They have been an active partner in beta testing upcoming version releases, including Premier 10.3. In the future they plan to continue to fully utilize the new features of 10.3 including AWS.NET, providing them with a simplified interface that streamlines transactions, is flexible with label editing and customization, and further personalizes their user experience.

Benefit Overview

- Real Time Inventory
- Visibility
- Streamline Processes
- Reporting and Data Analysis

Contact ProcessPro today:

info@ProcessProERP.com
 www.ProcessProERP.com
 800.457.3548



Unit 4 Group - Case Study

Sodertorn University

UNIT4 – Case History – Sodertorn University

UNIT4'S AGRASSO CLOUD CONVERSION CUSTOMER SEES \$500K+ SAVINGS OVER 11 YEARS

Forward-Thinking Swedish University Cites Additional Security, Accessibility, Efficiency Advantages; Major Change Events are Streamlined Via Change-Ready Vita Architecture and Resource Consolidation

OVERVIEW

Sodertorn University, located in a Stockholm, Sweden suburb, is a forward-thinking "University College" that bridges the higher education experience beyond Sweden's government-sponsored high school into collegiate coursework. With 13,000 students, 850 university employees, and revenue of more than 650 million Swedish Krona (just under \$100 million U.S.), the thriving 16-year-old institution has an optimistic eye on the future as it changes with new economic requirements.

Acclaimed for both the quality of its 60 academic programs and its innovative focus on environmental/societal change impact in the Baltic region and Eastern Europe, Sodertorn University is a higher education market trendsetter. In fact, in 2001, it was the very first UNIT4 enterprise resource planning (ERP) customer to move from an on-premise Agresso software deployment to become the company's first cloud-transitioned customer.

Today, it is UNIT4'S prototypical customer: an entity that has not only survived, but thrived in changing circumstances; a textbook example of "Education Living in change." Through UNIT4's post-implementation agility capabilities in both its software and deployment options, Sodertorn University embraces change adroitly -- by managing financial and people resources, by providing a secure network environment to its constituents, and by leveraging leading-edge technology -- without the maintenance headaches that accompany on-premise deployments.

THE NEED

Sodertorn University has been using the Agresso ERP solution since its inception in 1996, initially deploying the software on premise, and then five years later (2001) becoming the very first Agresso on-premise customer to move seamlessly to a cloud environment.

UNIT4 – Case History – Sodertorn University

“We were in rapid expansion mode, both in our student and faculty population, and it was the right juncture for us to re-align what we wanted our internal priorities to be,” said Anna Sande, IT System Administrator at Sodertorn University. “When I came here in 2001 we had been using Agresso ERP for five years and have about one-third of the student population that we have today. The University administrative team was assessing and reorganizing assets for the best way forward. We wanted to redeploy internal resources to move away from pure technology-related support and instead move towards programs that benefit students.”

Sodertorn University's decision was that a cloud deployment model would be beneficial for the university in a number of areas: it would save costs, eliminate distractions like new hires and additional software and training that would be required for data security and maintenance issues, and provide the ongoing agility the University needed to face whatever “growing pains” and adjustments might be necessary to support change over the coming years.

THE BENEFIT

Eleven years later, and after successfully responding to a number of both expansion and resource consolidation requirements, Sodertorn University reflects that its early decision on a cloud deployment model was absolutely on target for its needs. Further, the University can track the equivalent of more than **\$500,000 in savings** by moving to UNIT4's cloud deployment model, based on the ability to consolidate technology resources, re-allocate dedicated headcount requirements and/or through re-assigning IT roles. “From a financial perspective alone, moving off premise to the UNIT4 cloud deployment option is a significant budget advantage,” Sande said. “But when you add in the additional benefits, this is a compelling advantage for any education institution dealing with change.”

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In addition to the substantial savings, UNIT4's globally documented easy-change capabilities have fueled the University's ability to remain nimble. "We've had the twin change-management realities of rapid student growth interfacing with changing economic factors that are challenging to predict and plan for," Ms. Sande says. "We've adjusted from one campus, to three, and then in 2012 back to one large one again. We required zero external IT resource help to do it – the change capabilities of the UNIT4 architecture have supported our various business decisions seamlessly."

Emboldened by the longstanding ability to adjust easily, the University plans to tackle another major operational change in 2013, and will reorganize from six institutions to four. "This requires substantial hierarchical role changes and administrative adjustments," Ms. Sande said. "Roles, reporting, everything will change again, and our Agresso cloud solution allows us to do this easily without organizational disruption."

In addition to the savings and change capabilities, Sodertorn University also claims these advantages to its UNIT4 cloud deployment:

1. **Data and Accessibility Security:** Highlighted by the University as a core objective based on government mandates/audits, University officials state that the UNIT4 Agresso cloud deployment is so strong from a security/uptime standpoint that government officials tell them "we don't even need to contact you anymore."
2. **Latest Technologies/Software Features:** UNIT4's multi-tenant cloud solution always has its customers on a single, newest release that is continually (and simultaneously) upgraded to all constituents. "We never have to be distracted by new versions, upgrades or enhancement – they just flow through," Ms. Sande said.
3. **Less Training, More Freed up Capital:** Ms. Sande says she can easily estimate the equivalent of another \$6,000 per year that the University is saving in avoiding the need to hire/update/train staff IT resources if any ERP solution were deployed on premise. "In today's economy, we chose instead to direct our resources to more substantive programs that improve our University capabilities and reputation, not our infrastructure."

About UNIT4



UNIT4 is a global business software and services company aimed at helping dynamic public sector, and commercial services organizations to embrace change simply, quickly and cost effectively in a market sector it calls 'Businesses Living IN Change' (BLINC)[™]. The Group incorporates a number of the world's leading change embracing software brands including Agresso Business World, our flagship ERP suite for mid-sized services intensive organizations and Coda, our best-of-class financial management software. With operations in 17 European countries, as well as 7 countries across North America, Asia Pacific and Africa and sales activities in several other countries, its revenue was \$602 million in 2011. UNIT4 is headquartered in Sliedrecht, the Netherlands and has over 4,000 employees. It is listed on Euronext Amsterdam and is included in the Amsterdam Midcap Index (AMX).

Eval-Source

Enterprise Evaluation Services

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.

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 priorities
- We translate your business processes and map your business requirements to vendor speak

RFI Creation & Vendor Management

- Our services create business based RFI's that represents your organizational needs clearly & precisely
- 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, build 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 Yourself – 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:

- Software evaluation services
- Cloud evaluation services
- Cloud, SaaS, PaaS, IaaS computing consulting
- ERP, SCM and system strategy consulting
- IT Assessments, Research, Market Overviews
- Vendor Consulting
- IT due diligence
- Management Consulting

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 130+ 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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