ERP VENDOR UPDATE

Distribution

9 Software Companies, 12 Solutions

Insight on Today's Top ERP Providers

ULTRA CONSULTANTS

ABOUT THIS REPORT

ERP Vendor Update: Distribution is compiled by Ultra Consultants from interviews with software company product experts, product documentation and product briefings, independent research and Ultra internal documents.

Ultra's Insight is the opinion of our expert consultants, is based on interviews with software company product experts, project experience, sales experience and product knowledge, and is not intended to provide a complete review or comprehensive analysis of the products or companies described.

Note: This report covers selected ERP vendors, which were chosen based on solution suitability for the distribution vertical, market presence, and Ultra's most-recent product information and project experience.

Company and product information in this report has been reviewed by the software vendors featured.

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Today, in what many are calling "the new now," distributors are challenged like never before: Supply chain networks remain exceptionally complex and unpredictable, competition is tougher every day, and customer expectations are escalating. And, most important (and concerning), margins are slim (and getting slimmer).

It's critically important to do everything that can be done to shave costs, increase revenue and boost profitability. The challenge is identifying the processes and functions where new efficiencies, a couple of pennies and a tenth of a percentage point of improvement can be found.

How can your organization get more efficient? The answer: By driving change in virtually every function.

Fix broken business processes. Eliminate workarounds and manual make-dos. Integrate core systems. Optimize purchasing. Maximize warehouse efficiency. Streamline logistics and shipping. Shorten the order cycle. Improve supply chain management. Accelerate invoicing. Enhance cashflow. Upgrade analytics. Enhance transparency and visibility into operations.

To do these things, you need the right ERP solution. But what is the best solution for your organization?

That's a difficult question. Because every company is different. Because no company handles any phase of operations the same way. Because business processes are built around the unique requirements of each organization.

Start by asking a different set of questions: What new capabilities does your organization need and want? What problems are you trying to solve? What do you want your core processes to look like? How can new tools enable your organization's digital transformation?

5 BEST PRACTICES FOR ERP VENDOR SELECTION

Whether your company is implementing an ERP system for the first time, or replacing a legacy implementation, it's critically important to make the right choice.

We asked our expert consultants to give us their thoughts on best practices in ERP selection for distribution organizations, and this is what they told us:

1. Emphasize Industry Experience

Focus on distribution industry experience when choosing an ERP vendor, including (and especially) your particular segment. Here's why this expertise is important: An ERP vendor may have broad distribution experience but may not have deep knowledge of the unique needs of your segment. Look at its overall presence in distribution, too. Is its toolset widely used by companies like yours?

Ask your potential vendors to tell you how they plan to be a leading solution in your marketspace. Evaluate its features and functions to see how well they align with the industry's challenges. Read the case studies and success stories provided by the vendor – they are a good source of insight into how they build solutions for companies like yours. Ask for the product roadmap for your industry segment.

2. Assess the Total Cost of Ownership

Establish a budget in terms of implementation and total cost of ownership (TCO), then ask potential vendors if your budget and their solution are a fit.

A solution quote usually includes software (subscription or license), first-year support and implementation consulting. (Additional sites and add-on modules will be extra.) TCO, however, is broader, and takes into consideration per-user license costs, training, maintenance, customizations, upgrades, internal costs and other fees.

If the system is cloud or software as a service (SaaS), take a hard look at the Service Level Agreement (SLA) for any hidden costs, such as system enhancements and upgrades.

The scale and complexity of most ERP projects make it difficult to get, and stick to, a fixed price. Be aware that ERP vendors that offer a fixed price might exclude necessary work and training. Identify and note all inclusions and exclusions.

3. Consider Technology Strategy

Know that an ERP solution must fit the overall IT strategy of your organization. And because the IT department plays a key role in deciding whether an ERP system is feasible, it should determine and provide any technology requirements at the outset.

If on-premises ERP systems are a consideration, the IT department will need to have the resources to maintain and upgrade the software, as well as be able to provide the necessary infrastructure, servers, databases and security.

If the company is going with a cloud-based system, it's still essential to have the IT department involved in the ERP vendor selection process. There may be connectivity and integration issues with existing systems, particularly legacy on-premises systems.

4. Put the Vendor Under a Microscope

Where will the vendor be in the next five or 10 years? Many niche players have been acquired or merged with other ERP vendors – with both positive and negative results.

What's important to your company? The major ERP vendors offer big, broad solutions that will meet most of your needs, but come with greater complexity, risk and investment. Specialized vendors offer "smaller" solutions that will meet your industry-specific requirements but may not be as strong in some core functions.

5. Speak with Real Customers

Don't let your ERP vendor get away with giving you a list of hand-picked customer references in a variety of industries.

To get the best idea of how a solution will perform for you, ask for references that have been on the solution for at least a year, are in the same industry as your company, are roughly the same size, and have similar requirements. Then make the effort to speak with these customers (particularly their ERP professionals) to get their insight, opinion and feedback. Choose one for an on-site visit.

By applying these best practices, your company will better understand the strengths and weaknesses of potential ERP vendors. And it will be easier to narrow down the list and choose a software solution that will deliver greater efficiency, improved visibility and a competitive advantage.

Top 10 ERP Selection Criteria

- Functional fit
- Industry experience
- Software price, TCO and ROI
- Vendor viability
- Implementation project considerations
- Technology
- Risk
- Scalability
- References
- Post go-live support

EXPERT Q&A:
LESSONS LEARNED FROM THE PANDEMIC – AND SMART CHANGES TO MAKE

Many distributors struggled amid the uncertainty of the COVID-19 pandemic. But that is old news.

What's interesting – and important – now is to look closely at how distributors reacted and adapted to a suddenly (and fundamentally) changed business environment, determine the lessons learned from the unprecedented disruption, and identify the changes forward-looking companies should make to their business, strategies, processes and technologies to prepare for the (inevitable) disruptions to come.

We asked one of Ultra's experienced distribution consultants, David Saunders, for insight into the effects and after-effects of the pandemic from the distributor's point of view – and the transformations smart organizations are making to ensure they're ready to handle the unexpected. Here is an edited version of the conversation:

Let's start by setting the stage for our conversation. What were the most significant pandemic-related disruptions for distributors?

David Saunders (DS): The biggest problem distributors encountered was major disruptions to their supply chains. Distributors couldn't get product from their vendors and suppliers, and if they were importing anything, some countries were shut down for a period, and manufacturers and suppliers in those countries were unable to provide items that were ordered.

Obviously, that was a big challenge. Even though U.S. distributors were back at work, they experienced significant supply disruptions domestically and internationally, and then ran into secondary problems like manufacturing shutdowns, driver shortages, travel restrictions and lockdowns. At some points it was impossible to get resupplied.

And there was another disruption, too, which was not any less significant: Because of lockdowns, people were unable or afraid to go anywhere – including the office. Most distributors rely on their sales team to sell products, but salespeople were unable to go out and sell. So, for a lot of distributors, their sales model was disrupted. And, on top of that, if they had an on-premises ERP solution, they couldn't access it to get orders into the system.

All of this was, well, not at all optimal. Distributors were challenged getting sales orders, and when they could, they struggled getting product to fulfill them.

How did distributors adapt to those difficult circumstances?

DS: There's only so much you can do if you can't get product from overseas. For a distributor, the next option is to source

what we need locally and domestically and go with a multi-vendor strategy. But that presents its own problem: Are we set up to find and utilize multiple sources for the same or similar product?

Not all ERP systems, especially older ones, are designed to handle an item with multiple suppliers associated with it. As a result, you end up having to manage things manually, including manually overriding orders. Again, that's not optimal.

Setting old-technology issues aside, the pandemic pushed distributors to reduce their risk by finding additional and backup sources, and by establishing new supplier relationships.

The pandemic also created an opportunity for their purchasing team to step back and revisit the products they're sourcing, where they're sourcing them from, and look at alternatives. Their most important questions: How can we create an effective supplier strategy and evaluate vendors, so that we know we can always get the product we need? Which products are critical to our business?

As a workaround to lockdowns, and to combat manufacturers bypassing them with direct sales, smart distributors shifted their focus to ecommerce – a change that brought in critical revenue and a renewed emphasis on their value-add.

The value-add can be speed, product offering, product knowledge, customer service, customer support, single-source. Sure, customers could go to the manufacturer to get the product. But if they go to their distributor, they can choose from a broader offering, they can pay one invoice, they can access deep product knowledge and, if they have an issue, the distributor is there to resolve it. A distributor is a one-stop shop. And they'll take care of you.

What are distributors doing to accommodate B2B customers' increasing preference to buy online?

DS: That's a challenge. The trend is that B2B buyers are becoming more like B2C buyers. It's the "Amazon effect." Many of today's B2B buyers want the Amazon experience. They don't want to talk to or interact with a sales rep. They want to go online, see all the options, know what's in-stock, place an order, get an email confirmation, and know when it's going to show up on the dock. That's what they're used to as consumers, and that's what their expectation is when dealing with a distributor in B2B.

It doesn't mean there isn't a role for salespeople going forward. In fact, there is a critical role for them. But what they do needs to be redefined. And companies need to transform the service they're providing through their sales team, and need to change their focus from being order-takers to becoming true partners and product experts who help their customers' businesses be successful.

With the worst of the pandemic behind us, what are the lessons distributors learned, and how are they adapting their businesses to the new now?

DS: One of the things we're seeing is that distributors are wondering what they want to be from a strategic perspective. The world's changed, and this is not going to be the last disruption.

What can they do to prepare their organizations to be proactive and be able to respond and quickly adapt to changes as they come? Do they have the right people, processes and systems in place?

How do they compensate for labor shortages going forward? Who's going to fill their open positions? Or are we looking

at a new dynamic in the marketplace where we rely more on systems to process basic sales orders?

Is their ERP solution current enough to enable more automation, leverage advanced technologies and accommodate change? And is their ecommerce solution integrated enough to be efficient, effective and successful? Can they utilize sales order processing technologies to automate the intake of emailed, PDF and printed orders, and handle invoice and payment, with minimal human interaction?

There are a lot of technologies available to drive sales, mitigate disruption and eliminate basic, manual, non-value-added activities, processes and decisions. But you've got to have a modern ERP to take advantage of them.

Many distributors are moving to a cloud-based ERP solution to enable their people to work remotely. We had a client that went live on a cloud solution right before the pandemic hit, which was fortunate. Their first comment was, "I don't know what we would have done if we hadn't migrated to a new solution." Their old ERP was a stuck-together, very manual, on-premises solution. And now they're on a modern, cloud-based solution. And they didn't miss a beat in the pandemic. They were lucky and smart, with our help.

What should distributors do to prepare for future disruptions? Or how can they change their business so disruptions are not disruptive to their business?

DS: There is always going to be some sort of disruption. Are you prepared? Are you thinking strategically about how to react to them?

It's all about evaluating the three core pieces: people, processes and systems. Do you have flexible processes in place, and will your technology enable greater agility? Are you able to quickly react to unforeseen circumstances?

And labor shortages will only get worse as the Baby Boomers continue to leave the workforce. Who's filling their jobs? Maybe no one. The answer may be increased automation, artificial intelligence (AI) and machine learning.

It's important to remember, too, that disruptions can be something other than a pandemic. Tomorrow's disruptions may be technological – artificial intelligence, the Internet of Things (IoT), machine learning, etc. These are potentially tremendously disruptive technologies. And for distributors, success may depend on whether they are ready to leverage the advantages and opportunities they offer.

Today, it's important for distributors to have the right systems to manage effectively, operate efficiently and thrive in the future – no matter what happens. It's necessary to have the right processes in place to quickly adapt to marketplace changes. And it's critical to be able to take advantage of advanced technologies.

David Saunders is a Senior Consultant for Ultra Consultants, with more than 25 years of experience helping wholesale distribution companies and manufacturing organizations leverage modern ERP technologies, optimize their operations and accelerate their business processes.

KEY ERP SOFTWARE CAPABILITIES COMPARISON: DISTRIBUTION

This capabilities information is compiled by Ultra Consultants from interviews with software company product experts, product documentation and product briefings, independent research and Ultra internal documents.

CATEGORY	FUNCTIONALITY	ACUMATICA	APTEAN	EPICOR PROPHET 21	INFOR CLOUDSUITE DISTRIBUTION	INFOR CLOUDSUITE DISTRIBUTION ENTERPRISE	MICROSOFT DYNAMICS 365 BUSINESS CENTRAL/ STONERIDGE	MICROSOFT DYNAMICS 365 FINANCE & OPERATIONS /ARGANO ARBELA	ORACLE CLOUD/ TERILLIUM	ORACLE NETSUITE	SAGE X3	SAP BUSINESS ONE/VISION 33	SAP S/4HANA
Customer Management	CRM - Pipeline Management	Add-On	Aptean CRM	Core	Add-On	Add-On	Core	Core	Core	Core	Core	Core	Add-On
Customer Management	CRM - Marketing Management	Add-On	Core	Core	Add-On	Add-On	Core	Core	Core	Core	Core	Core	Add-On
Customer Management	Customer Quotes	Add-On	Core	Core	Core	Core	Core	Core	Core	Core	Core	Core	Core
Customer Management	Customer Case Management	Add-On	Aptean CRM	Core	Add-On	Add-On	Core	Core	Core	Core	Core	Core	Add-On
Customer Management	Automated Sales Order Processing	Add-On	Core	Core	Core	Core	3-P	Core	Core	Core	Core	Core	Core
Customer Management	Pricing, Rebates and Promotions	Core	Core	Core	Core	Core	Core	Core	Core	Core	Core	Core	Core
Customer Management	Customer Returns	Core	Core	Core	Core	Core	Core	Core	Core	Core	Core	Core	Core
Customer Management	Omni Channel Support	Core	Add-On	Core	Core	Core	Core	Core	Core	Core	Core	Core	Add-On
Customer Management	Point of Sales Support	Add-On	None	Core	Core	Add-On	3-P	Core	Core	Core	3-P	3-P	3-P
Customer Management	Sales Tax Calculation and Reporting	Core	3-P	Core	Core	Core	Core	Core	Core	Core	3-P	3-P	3-P
eCommerce	B2B Customer Portal	Core	Add-On	Add-On	Add-On	Add-On	Core	Core	Core	Core	3-P	Add-On	Add-On
eCommerce	B2C Customer Website	Core	Add-On	Add-On	Add-On	Add-On	3-P	Core	Core	Core	3-P	Add-On	Add-On
Field Service	Field Service Mobile App	Add-On	Aptean Field Service	Add-On	Add-On	Add-On	Core	Core	Core	3-P	Core	Core	Add-On
Field Service	Field Service Management	Add-On	Aptean Field Service	Add-On	Add-On	Core	Core	Core	Core	3-P	Core	Core	Add-On
Field Service	Warranty Management	Add-On	Aptean Field Service	Add-On	Core	Core	Core	3-P	Core	Core	Core	Core	Core
Supply Chain Management	Qualitative Forecasting	3-P	Core	Core	Core	Add-On	3-P	3-P	Core	Add-On	Add-On	Core	Add-On
Supply Chain Management	Demand Planning	Core	Core	Core	Core	Core	Core	Core	Core	Core	Core	Core	Add-On
Supply Chain Management	Distribution Resource Planning (DRP)	Core	Core	Core	Core	Core	Core	Core	Core	Core	None	Corev	Add-On
Supply Chain Management	Product Costing Methodologies	Core	Core	Core	Core	Core	Core	Core	Core	Core	Core	Core	Core
Supply Chain Management	Global Supply Chain Visibility	3-P	Core	Core	Core	Core	3-P	Core	Core	Core	Core	Core	Add-On
Procurement	Alternative Product Sourcing	Core	None	Core	Core	Core	Core	Core	Core	Core	Core	Core	Core
Procurement	Automated Payables	Core	None	Core	Core	Core	Core	Core	Core	Core	3-P	Core	Core
Procurement	Vendor Returns	Core	None	Core	Core	Core	Core	Core	Core	Core	Core	Core	Core
Product Management	Product Lifecycle Management (PLM)	3-P	Core	3-P	3-P	Add-On	3-P	Core	Core	3-P	None	3-P	Add-On
Product Management	Product Data Management (PDM)/Product Information Management (PIM)	3-P	Aptean PLM	Core	3-P	Core	3-P	Core	Core	3-P	Core	3-P	Add-On
Product Management	GS1 GDSN Data Synchronization	3-P	None	Add-On	3-P	Core	None	Core	Add-On	3-P	3-P	3-P	Add-On
Product Management	Product Profitability	Core	Core	Core	Core	Core	Core	Core	Core	Core	Core	Core	Core
Quality Management	Serial and/or Lot Control Track-and-Trace	Core	Core	Core	Core	Core	Core	Core	Core	Core	Core	Core	Core
Quality Management	Quality Compliance	3-P	Aptean PLM	Core	Add-On	Core	3-P	Core	Core	Core	Core	3-P	Core
Quality Management	Non-Conformance Management	3-P	None	Core	Core	Core	3-P	Core	Core	Core	Core	None	Add-On
Transportation Management	Small Parcel Processing	Core	Core	3-P	Core	Core	3-P	Core	Core	Core	Core	3-P	3-P
Transportation Management	Freight Bill Auditing	Core	Aptean TMS	3-P	3-P	3-P	3-P	Core	Core	3-P	3-P	3-P	Core
Transportation Management	Freight Asset Management	None	Aptean TMS	3-P	3-P	Core	3-P	Core	Core	3-P	3-P	3-P	Core
Transportation Management	Routing	3-P	3-P	3-P	3-P	Core	3-P	3-P	Core	Core	3-P	3-P	Add-On
Transportation Management	Dock scheduling	3-P	Aptean TMS	3-P	3-P	Add-On	3-P	Core	Core	Add-On	Core	None	Add-On
Transportation Management	Yard Management	3-P	Aptean TMS	3-P	Add-On	Add-On	3-P	3-P	Core	3-P	Core	None	Add-On
Transportation Management	State Gas Tax Settlement	None	Aptean TMS	3-P	3-P	Core	3-P	None	Core	3-P	None	None	3-P
Warehouse/Inventory Management	Device/Mobile Scanning & Equipment Supported	Add-On	Add-On	Core	Add-On	Add-On	3-P	Core	Core	Core	Add-On	3-P	Core
Warehouse/Inventory Management	Real-Time Labor/Order Reporting	Core	Core	Core	Add-On	Add-On	Core	3-P	Core	Core	None	Core	Add-On
Warehouse/Inventory Management	Robust Cycle Counting	Core	Core	Core	Core	Core	Core	Core	Core	Core	Core	Core	Core
Warehouse/Inventory Management	Cross-Docking	3-P	Core	Core	Core	Core	Core	Core	Core	Add-On	Core	3-P	Add-On
Warehouse/Inventory Management	Warehouse Optimization	3-P	Core	Core	Add-On	Add-On	Core	Core	Core	Add-On	Core	None	Add-On
Warehouse/Inventory Management	Integration with Conveyors/Robotics (Whse Execution System integration)	None	None	Core	Add-On	Add-On	3-P	3-P	Core	Add-On	Add-On	3-P	Add-On
Warehouse/Inventory Management	ASN Receiving	3-P	None	Core	Core	Core	3-P	3-P	Core	Core	3-P	3-P	Core
Warehouse/Inventory Management	Directed Putaway and Replenishment	3-P	Core	Core	Add-On	Core	Core	Core	Core	Core	Core	3-P	Core
Warehouse/Inventory Management	Shelf Life Management	Core	Core	Core	Core	Core	Core	Core	Core	Core	Core	3-P	Core
Warehouse/Inventory Management	Variable/Catch Weight Management	3-P	Core	Core	Core	Core	3-P	Core	Add-On	Core	None	3-P	Core
Warehouse/Inventory Management	Task Interleaving	Add-On	None	Core	Add-On	Add-On	3-P	None	Core	Add-On	None	3-P	Add-On
Warehouse/Inventory Management	Voice Enabled Picking	3-P	None	None	Add-On	Add-On	3-P	3-P	3-P	Add-On	None	None	Add-On
Warehouse/Inventory Management	Put/Pick to Light	None	None	Core	3-P	Add-On	3-P	3-P	Core	Add-On	None	3-P	Add-On
Warehouse/Inventory Management	Value Add Services	Core	Core	Core	Core	Core	3-P	Core	None	Core	None	Core	Add-On
Warehouse/Inventory Management	Kitting and Assembly	Core	Core	Core	Core	Core	Core	Core	Core	Core	Core	Core	Add-On

Ultra's Insight: Distribution-Specific and Unique Pricing

Acumatica is one of the newer players in the distribution ERP space, and it offers a cloud solution designed for distribution. Acumatica is hosted using Amazon Web Services (AWS), a leader in the industry. Acumatica was first released in 2008 and has been growing rapidly ever since.

Acumatica focuses on companies with revenues that range between $20 million and $200 million, with some existing customers that have significantly higher revenues. The number of employees at companies that are good fits for Acumatica is around 200. Many of Acumatica's most satisfied customers have come from an on-premises software that did not have the ability to have multiple functions supported.

A competitive advantage that Acumatica has is that its architecture is engineered to support cross-functionality. Another advantage is the ability to allow third parties to develop and modify business logic. The design of the ERP allows this because the core logic is protected but the business logic is available above the core logic to be modified.

The warehouse management capability of Acumatica is one of the functionalities that drives companies to select it. Customers can use mobile devices for warehouse operations such as receiving, put-away, picking/packing and shipping, as well as inventory management activities like cycle counting or transfers.

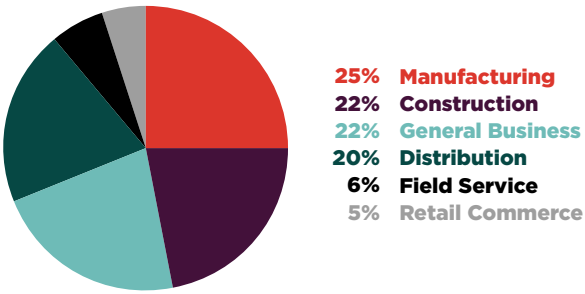
Acumatica's customers are extremely loyal – it claims a 95% retention rate. And most customers that leave are due to acquisitions. Acumatica does not price on a user license or revenue basis – it prices based on transaction volume, which is unique to the industry. It does have flexibility, however, to do user-based pricing if a customer insists on it.

The majority of Acumatica's customers are based in North America, but it has large customers in Southeast Asia, as well as some in the United Kingdom, Mexico and South Africa.

KEY ERP SOFTWARE CAPABILITIES: Acumatica

CATEGORY	FUNCTIONALITY	CLASSIFICATION	DEMONSTRATED INTEGRATIONS
Customer Management	CRM - Pipeline Management	Add-On	
Customer Management	CRM - Marketing Management	Add-On	
Customer Management	Customer Quotes	Add-On	
Customer Management	Customer Case Management	Add-On	
Customer Management	Automated Sales Order Processing	Add-On	
Customer Management	Pricing, Rebates and Promotions	Core	
Customer Management	Customer Returns	Core	
Customer Management	Omni Channel Support	Core	
Customer Management	Point of Sales Support	Add-On	
Customer Management	Sales Tax Calculation and Reporting	Core	
eCommerce	B2B Customer Portal	Core	
eCommerce	B2C Customer Website	Core	
Field Service	Field Service Mobile App	Add-On	
Field Service	Field Service Management	Add-On	
Field Service	Warranty Management	Add-On	
Supply Chain Management	Qualitative Forecasting	3-P	
Supply Chain Management	Demand Planning	Core	
Supply Chain Management	Distribution Resource Planning (DRP)	Core	
Supply Chain Management	Product Costing Methodologies	Core	
Supply Chain Management	Global Supply Chain Visibility	3-P	
Procurement	Alternative Product Sourcing	Core	
Procurement	Automated Payables	Core	
Procurement	Vendor Returns	Core	
Product Management	Product Lifecycle Management (PLM)	3-P	
Product Management	Product Data Management (PDM)/Product Information Management (PIM)	3-P	
Product Management	GS1 GDSN Data Synchronization	3-P	
Product Management	Product Profitability	Core	
Quality Management	Serial and/or Lot Control Track-and-Trace	Core	
Quality Management	Quality Compliance	3-P	
Quality Management	Non-Conformance Management	3-P	
Transportation Management	Small Parcel Processing	Core	
Transportation Management	Freight Bill Auditing	Core	
Transportation Management	Freight Asset Management	None	
Transportation Management	Routing	3-P	
Transportation Management	Dock scheduling	3-P	
Transportation Management	Yard Management	3-P	
Transportation Management	State Gas Tax Settlement	None	
Warehouse/Inventory Management	Device/Mobile Scanning & Equipment Supported	Add-On	
Warehouse/Inventory Management	Real-Time Labor/Order Reporting	Core	
Warehouse/Inventory Management	Robust Cycle Counting	Core	
Warehouse/Inventory Management	Cross-Docking	3-P	
Warehouse/Inventory Management	Warehouse Optimization	3-P	
Warehouse/Inventory Management	Integration with Conveyors/Robotics (Whse Execution System integration)	None	
Warehouse/Inventory Management	ASN Receiving	3-P	
Warehouse/Inventory Management	Directed Putaway and Replenishment	3-P	
Warehouse/Inventory Management	Shelf Life Management	Core	
Warehouse/Inventory Management	Variable/Catch Weight Management	3-P	
Warehouse/Inventory Management	Task Interleaving	Add-On	
Warehouse/Inventory Management	Voice Enabled Picking	3-P	
Warehouse/Inventory Management	Put/Pick to Light	None	
Warehouse/Inventory Management	Value Add Services	Core	
Warehouse/Inventory Management	Kitting and Assembly	Core	

Customers by Industry



Targeted Distribution Verticals

- Auto Parts
- Cosmetics
- Electronics and Computer Systems
- Industrial Parts
- Medical Supplies
- Packaging and Packaging Supplies

Distribution Customers

- AFF Group
- Bluefin Collectibles
- Consolidated West
- Korpack
- Tayse Rugs

Acumatica's Pitch

Acumatica provides a complete suite of distribution applications to boost sales, automate warehouse operations, optimize inventory and streamline purchasing.

Last-mile features such as matrix items, inventory allocations, warehouse management, advanced wave and batch picking, up-sell, cross-sell, item substitutions, paperless directed picking, lot and serial tracking, kitting, and requisitions simplify item and inventory management.

Acumatica Cloud ERP provides the best business and industry management solution for transforming your distribution business to thrive in the new digital economy. Built on a future-proof platform with an open architecture for modern technologies, rapid integrations, scalability and ease of use, Acumatica delivers unparalleled value to small and midmarket distributors.

Deployment Options

Profile

Acumatica (acumatica.com), founded in 2008, is a technology provider that develops cloud- and browser-based enterprise resource planning (ERP) software for small and medium-sized businesses. The company is headquartered in Bellevue, Wash., USA. Acumatica is owned by EQT Partners, which also owns IFS – a combination the firm hails as a "global cloud ERP powerhouse."

Ultra's Insight: Built for Distribution and Its Needs

Aptean Distribution ERP is one of several Aptean solutions that are purpose-built for specific industries. Roughly 55% of the company's revenues are generated in North America, 44% from Europe and the remaining 1% from the rest of the world. Each solution is supported by experts who come out of industry.

The company differentiates itself from other software vendors by its focus on delivering mission-critical, industry-specific software. While each Aptean solution is a different core ERP solution, there are a series of advanced modules that are available for integration to any of the ERP solutions. These modules include Warehouse Management, Transportation Management, ePayments and eCommerce, Sales & Customer Management, Electronic Data Interface (EDI), Manufacturing Execution, Enterprise Asset Management, Product Lifecycle Management.

Aptean Distribution ERP customers typically are mid-market consumer goods importers and distributors with revenues ranging from $10 million to $300 million and/or 10 to 250 concurrent users. Its target market includes customers that have design teams – not manufacturers *per se* but companies that source product from Asia (long lead times). Generally, they are not fast-moving consumer product goods distributors, (i.e., home goods) and include value-added services such as light assembly and light kitting.

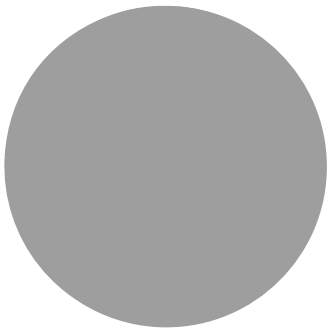
Aptean Distribution ERP has over 400 customers based in the United States, United Kingdom and EMEA. Two-thirds of their customers are implemented on the cloud solution. While available both as on-premises and SaaS single-tenant solutions, over the last three to four years the SaaS has been the primary option.

Key differentiators include embedded EDI, chargeback management, profitability scorecards and long lead time forecasting. The profitability scorecards are a module around profitability that includes calculating royalties, chargebacks, allowances, commissions, EDI and special handling. Aptean also strives to provide a complete solution for distribution customers such that they don't need to utilize third-party solutions.

KEY ERP SOFTWARE CAPABILITIES: Aptean Distribution ERP

CATEGORY	FUNCTIONALITY	CLASSIFICATION	DEMONSTRATED INTEGRATIONS
Customer Management	CRM - Pipeline Management	Aptean CRM	
Customer Management	CRM - Marketing Management	Core	
Customer Management	Customer Quotes	Core	
Customer Management	Customer Case Management	Aptean CRM	
Customer Management	Automated Sales Order Processing	Core	
Customer Management	Pricing, Rebates and Promotions	Core	
Customer Management	Customer Returns	Core	
Customer Management	Omni Channel Support	Add-On	Aptean EDI, Aptean eCommerce
Customer Management	Point of Sales Support	None	
Customer Management	Sales Tax Calculation and Reporting	3-P	AvaTax
eCommerce	B2B Customer Portal	Add-On	Aptean eCommerce
eCommerce	B2C Customer Website	Add-On	Aptean eCommerce
Field Service	Field Service Mobile App	Aptean Field Service	
Field Service	Field Service Management	Aptean Field Service	
Field Service	Warranty Management	Aptean Field Service	
Supply Chain Management	Qualitative Forecasting	Core	
Supply Chain Management	Demand Planning	Core	
Supply Chain Management	Distribution Resource Planning (DRP)	Core	
Supply Chain Management	Product Costing Methodologies	Core	
Supply Chain Management	Global Supply Chain Visibility	Core	
Procurement	Alternative Product Sourcing	None	
Procurement	Automated Payables	None	
Procurement	Vendor Returns	None	
Product Management	Product Lifecycle Management (PLM)	Core	
Product Management	Product Data Management (PDM)/Product Information Management (PIM)	Aptean PLM	
Product Management	GS1 GDSN Data Synchronization	None	
Product Management	Product Profitability	Core	
Quality Management	Serial and/or Lot Control Track-and-Trace	Core	
Quality Management	Quality Compliance	Aptean PLM	
Quality Management	Non-Conformance Management	None	
Transportation Management	Small Parcel Processing	Core	
Transportation Management	Freight Bill Auditing	Aptean TMS	
Transportation Management	Freight Asset Management	Aptean TMS	
Transportation Management	Routing	3-P	Omnitracs Roadnet
Transportation Management	Dock scheduling	Aptean TMS	
Transportation Management	Yard Management	Aptean TMS	
Transportation Management	State Gas Tax Settlement	Aptean TMS	
Warehouse/Inventory Management	Device/Mobile Scanning & Equipment Supported	Add-On	
Warehouse/Inventory Management	Real-Time Labor/Order Reporting	Core	
Warehouse/Inventory Management	Robust Cycle Counting	Core	
Warehouse/Inventory Management	Cross-Docking	Core	
Warehouse/Inventory Management	Warehouse Optimization	Core	
Warehouse/Inventory Management	Integration with Conveyors/Robotics (Whse Execution System integration)	None	
Warehouse/Inventory Management	ASN Receiving	None	
Warehouse/Inventory Management	Directed Putaway and Replenishment	Core	
Warehouse/Inventory Management	Shelf Life Management	Core	
Warehouse/Inventory Management	Variable/Catch Weight Management	Core	
Warehouse/Inventory Management	Task Interleaving	None	
Warehouse/Inventory Management	Voice Enabled Picking	None	
Warehouse/Inventory Management	Put/Pick to Light	None	
Warehouse/Inventory Management	Value Add Services	Core	
Warehouse/Inventory Management	Kitting and Assembly	Core	

Customers by Industry



Data not provided

Targeted Distribution Verticals

Consumer Goods:

- Fashion
- Food & Beverage
- Furniture/Home Décor/Furnishings
- Giftware
- Housewares
- Toys/Crafts/Hobby
- Wine & Spirits

Distribution Customers

(Data not provided)

Aptean's Pitch

Aptean Distribution ERP is cloud-enabled software designed to handle everything consumer goods importers and distributors need to efficiently run and grow their business without costly and complicated customizations or integrations. It enables enterprise-wide visibility and agility, improved operational processes, performance and profitability.

The platform is built with industry-specific functionality to fulfill core functions out-of-the-box, such as embedded EDI, chargeback management and forecasting tools, while ensuring the entire business is using real-time data to streamline and optimize their full supply chain. The solution is scalable to expand to accommodate growth with a dedicated team of consumer goods specialists for support.

Deployment Options

Profile

Aptean (aptean.com) is headquartered in Alpharetta, Ga., USA. A $360 million global provider of industry-specific enterprise software, the company serves 10,000 customers and provides niche solutions for process and discrete manufacturers and distributors.

EPICOR Prophet 21

Ultra's Insight: Strong Platform for Durable Goods Distributors

With Prophet 21, Epicor provides wholesale distribution customers with an option that supports all durable goods distributors with support for sub-verticals within distribution.

The majority of Epicor Prophet 21 distributors are based in North America and the United Kingdom. Epicor supports country localizations and languages for the countries in which their customers have locations. Their current base of support also is spurring growth in Australia/New Zealand and Mexico.

Epicor Prophet 21 is a cloud solution. The product began as an on-premises solution, and the company still provides support for this model. However, the product made a shift to an Azure cloud-based software solution on one common database. Epicor also has a unique offering in the Cloud technology space: a solution called "dedicated tenant." Customers share the network infrastructure and the application, but each client has a dedicated database. This is an attractive option for customers concerned about the safety and security of their data, particularly those that are involved with governmental contracts. Epicor is seeing 80-plus existing customers switch to the cloud each year. Upgrades occur every six months. Epicor tries to push out upgrades in the cloud environment to customers within 120 days of the release.

Epicor's strategy for Prophet 21 over the last 50 years is to provide a "fit for purpose" approach to its ideal market. This has led to P21 providing a great depth and width of functionality in its core offering to durable goods distributors. It has allowed Epicor to dive deeply into the functionality required by the sub-verticals in this marketing arena. As a result, it may not be the best option for Food and Beverage or Apparel distribution sub-verticals. For durable goods, it does have some features that support light manufacturing, like kitting, assembly and bill of materials. Epicor P21 also has a number of complimentary products for which it has pre-built integrations. These include Epicor Commerce Connect to Magento for eCommerce, a Service and Maintenance module from Epicor, shipping integration with Quickship, document management support through ECM (Epicor Content Management, and EDI functionality.

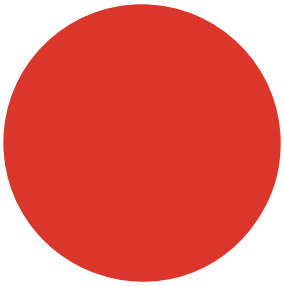
One of Epicor Prophet 21's strengths as a platform is that it provides both software and service. It has professional services and support teams dedicated to Prophet 21. They work closely with customers to learn their unique requirements. Through the use of their extensibility tool set, Epicor allows users to define their unique data fields, use rules to define business logic, and integrate through full API access across the product.

Epicor Prophet 21 prides itself in providing a portal to their customers to share and vote on ideas for functionality improvements. It also has advisory councils created for each sub-vertical, and seeks out membership from their customer's C-level to provide strategic input.

KEY ERP SOFTWARE CAPABILITIES: Epicor Prophet 21

CATEGORY	FUNCTIONALITY	CLASSIFICATION	DEMONSTRATED INTEGRATIONS
Customer Management	CRM - Pipeline Management	Core	
Customer Management	CRM - Marketing Management	Core	
Customer Management	Customer Quotes	Core	
Customer Management	Customer Case Management	Core	
Customer Management	Automated Sales Order Processing	Core	
Customer Management	Pricing, Rebates and Promotions	Core	
Customer Management	Customer Returns	Core	
Customer Management	Omni Channel Support	Core	
Customer Management	Point of Sales Support	Core	
Customer Management	Sales Tax Calculation and Reporting	Core	3P Avalara for more automation
eCommerce	B2B Customer Portal	Add-On	
eCommerce	B2C Customer Website	Add-On	
Field Service	Field Service Mobile App	Add-On	
Field Service	Field Service Management	Add-On	
Field Service	Warranty Management	Add-On	
Supply Chain Management	Qualitative Forecasting	Core	
Supply Chain Management	Demand Planning	Core	
Supply Chain Management	Distribution Resource Planning (DRP)	Core	
Supply Chain Management	Product Costing Methodologies	Core	
Supply Chain Management	Global Supply Chain Visibility	Core	
Procurement	Alternative Product Sourcing	Core	
Procurement	Automated Payables	Core	
Procurement	Vendor Returns	Core	
Product Management	Product Lifecycle Management (PLM)	3-P	
Product Management	Product Data Management (PDM)/Product Information Management (PIM)	Core	
Product Management	GS1 GDSN Data Synchronization	Add-On	
Product Management	Product Profitability	Core	
Quality Management	Serial and/or Lot Control Track-and-Trace	Core	
Quality Management	Quality Compliance	Core	
Quality Management	Non-Conformance Management	Core	
Transportation Management	Small Parcel Processing	3-P	Roadnet
Transportation Management	Freight Bill Auditing	3-P	Roadnet
Transportation Management	Freight Asset Management	3-P	Roadnet
Transportation Management	Routing	3-P	Roadnet
Transportation Management	Dock scheduling	3-P	Roadnet
Transportation Management	Yard Management	3-P	Roadnet
Transportation Management	State Gas Tax Settlement	3-P	Roadnet
Warehouse/Inventory Management	Device/Mobile Scanning & Equipment Supported	Core	
Warehouse/Inventory Management	Real-Time Labor/Order Reporting	Core	
Warehouse/Inventory Management	Robust Cycle Counting	Core	
Warehouse/Inventory Management	Cross-Docking	Core	
Warehouse/Inventory Management	Warehouse Optimization	Core	
Warehouse/Inventory Management	Integration with Conveyors/Robotics (Whse Execution System integration)	Core	
Warehouse/Inventory Management	ASN Receiving	Core	
Warehouse/Inventory Management	Directed Putaway and Replenishment	Core	
Warehouse/Inventory Management	Shelf Life Management	Core	
Warehouse/Inventory Management	Variable/Catch Weight Management	Core	
Warehouse/Inventory Management	Task Interleaving	Core	
Warehouse/Inventory Management	Voice Enabled Picking	None	
Warehouse/Inventory Management	Put/Pick to Light	Core	
Warehouse/Inventory Management	Value Add Services	Core	
Warehouse/Inventory Management	Kitting and Assembly	Core	

Customers by Industry



100% Durable Goods Distributors

Targeted Distribution Verticals

- Electrical
- Fasteners
- Fluid Power
- HVAC
- Industrial
- Medical
- Plumbing/PVF
- Tile

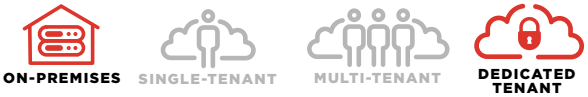
Distribution Customers

- Arizona Tile
- Duncan-Parnell Inc.
- Field Fastener Supply
- Grove Medical
- Jergens Industrial
- Radwell International
- Regency Lighting
- Stellar Industrial

Epicor's Pitch

No other ERP provider knows distribution like we do. Epicor Prophet 21 is designed specifically for distributors focused on the things that matter to you – growing sales, improving margins and increasing productivity and operational efficiency. We build our software using industry best practices and more than a half-century of experience to provide the capabilities and tools to keep distribution businesses healthy and thriving in today's highly competitive marketplace – capabilities that include actionable analytics, work queues, PO variance queues, kitting, assembly and production orders, advanced inventory forecasting, warehouse management, VMI, and special project pricing. For these reasons and more, we know we can help you drive growth.

Deployment Options



Profile

Epicor Software Corporation (epicor.com) provides flexible, industry-specific on-premises and cloud software solutions designed for manufacturing, distribution, retail and service industry organizations. Headquartered in Austin, Texas, USA, the company has 27,000 customers in 150 countries, and more than 3,800 employees in offices around the world. In 2020, Epicor generated $950 million in revenue.

CloudSuite™ Distribution

Ultra's Insight: Experience Enables Rapid Deployment

Infor provides global solutions that support 65,000 customers in 175 countries. It's distribution-focused solutions are implemented at 4,000 customers and are implemented in the top nine electrical distributors and the top nine building materials distributors.

This solution is backed up by 30-plus years of distribution industry experience. And this experience is manifested in its implementation accelerators that help businesses get up and running quickly with pre-configured distribution business processes and data models, user-defined home pages and distribution-specific training. Users can be productive faster, operate smarter and take advantage of efficient process flows.

Infor's CloudSuite Distribution (formerly SX.e) is effectively a scaled down version of Infor's CloudSuite Distribution Enterprise. Cloudsuite Distribution targets companies with annual revenues less than $250M, and with operations primarily in North America and the UK.

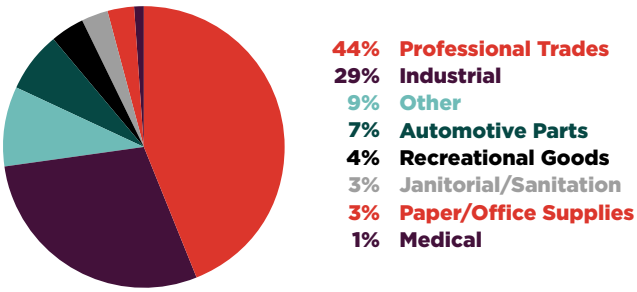
CloudSuite Distribution is a cloud-based, multi-tenant ERP solution purpose-built for wholesale distributors. CloudSuite Distribution delivers industry-specific capabilities without extensive customizations or integrations by combining the cloud platform built on infrastructure services from Amazon Web Services (AWS) and OS. Over recent years, CloudSuite Distribution has focused on continually improving the customer experience and leveraging new technologies such as artificial intelligence and machine learning.

Via InforOS, Infor's technology framework, companies can seamlessly integrate CloudSuite Distribution with other Infor- and non-Infor-based systems. Organizations can integrate and manage data and information workflow, no matter where the data resides or what application created it. Companies can even use InforOS's extensibility technology to customize CloudSuite Distribution's functionality and user interface. In addition to the core ERP solution, CloudSuite Distribution provides predefined integrations with Infor's Total Warehouse Logistics, Service Management and Storeroom Suite add-ons, as well as integrations to Infor WMS, Infor Rhythm for Commerce, Infor CRM and Infor CPQ.

KEY ERP SOFTWARE CAPABILITIES: Infor CloudSuite Distribution

CATEGORY	FUNCTIONALITY	CLASSIFICATION	DEMONSTRATED INTEGRATIONS
Customer Management	CRM - Pipeline Management	Add-On	Infor CRM
Customer Management	CRM - Marketing Management	Add-On	Infor CRM
Customer Management	Customer Quotes	Core	
Customer Management	Customer Case Management	Add-On	Infor CRM
Customer Management	Automated Sales Order Processing	Core	
Customer Management	Pricing, Rebates and Promotions	Core	
Customer Management	Customer Returns	Core	
Customer Management	Omni Channel Support	Core	
Customer Management	Point of Sales Support	Core	
Customer Management	Sales Tax Calculation and Reporting	Core	
eCommerce	B2B Customer Portal	Add-On	Infor Rhythm
eCommerce	B2C Customer Website	Add-On	Infor Rhythm
Field Service	Field Service Mobile App	Add-On	Infor Service Management
Field Service	Field Service Management	Add-On	Infor Service Management
Field Service	Warranty Management	Core	
Supply Chain Management	Qualitative Forecasting	Core	
Supply Chain Management	Demand Planning	Core	
Supply Chain Management	Distribution Resource Planning (DRP)	Core	
Supply Chain Management	Product Costing Methodologies	Core	
Supply Chain Management	Global Supply Chain Visibility	Core	
Procurement	Alternative Product Sourcing	Core	
Procurement	Automated Payables	Core	
Procurement	Vendor Returns	Core	
Product Management	Product Lifecycle Management (PLM)	3-P	Infor Product Lifecycle Management
Product Management	Product Data Management (PDM)/Product Information Management (PIM)	3-P	Infor Product Lifecycle Management
Product Management	GS1 GDSN Data Synchronization	3-P	Infor Product Lifecycle Management
Product Management	Product Profitability	Core	
Quality Management	Serial and/or Lot Control Track-and-Trace	Core	
Quality Management	Quality Compliance	Add-On	Infor WMS
Quality Management	Non-Conformance Management	Core	
Transportation Management	Small Parcel Processing	Core	
Transportation Management	Freight Bill Auditing	3-P	Multiple
Transportation Management	Freight Asset Management	3-P	Multiple
Transportation Management	Routing	3-P	DQ Technologies
Transportation Management	Dock scheduling	3-P	DQ Technologies
Transportation Management	Yard Management	Add-On	Infor WMS
Transportation Management	State Gas Tax Settlement	3-P	DQ Technologies
Warehouse/Inventory Management	Device/Mobile Scanning & Equipment Supported	Add-On	Infor WMS
Warehouse/Inventory Management	Real-Time Labor/Order Reporting	Add-On	Infor WMS
Warehouse/Inventory Management	Robust Cycle Counting	Core	
Warehouse/Inventory Management	Cross-Docking	Core	
Warehouse/Inventory Management	Warehouse Optimization	Add-On	Infor WMS
Warehouse/Inventory Management	Integration with Conveyors/Robotics (Whse Execution System integration)	Add-On	Infor WMS
Warehouse/Inventory Management	ASN Receiving	Core	
Warehouse/Inventory Management	Directed Putaway and Replenishment	Add-On	Infor WMS
Warehouse/Inventory Management	Shelf Life Management	Core	
Warehouse/Inventory Management	Variable/Catch Weight Management	Core	
Warehouse/Inventory Management	Task Interleaving	Add-On	Infor WMS
Warehouse/Inventory Management	Voice Enabled Picking	Add-On	Infor WMS
Warehouse/Inventory Management	Put/Pick to Light	3-P	Inegration/Multiple
Warehouse/Inventory Management	Value Add Services	Core	
Warehouse/Inventory Management	Kitting and Assembly	Core	

Distribution Customers by Industry



Targeted Distribution Verticals

- Automotive
- Building Materials
- Electrical
- HVAC/Plumbing
- Industrial
- Medical
- Paper/Office Supplies

Distribution Customers

- A&M Supply
- Alloy Fasteners, Inc.
- Doverco Inc.
- Electrical Terminal Services
- Headwater Companies
- Midwest Wheel
- Northwest Pump & Equipment
- Turf Care Products Canada

Infor's Pitch

CloudSuite Distribution is built specifically for the needs of small- to medium-size wholesale distributors. It's a comprehensive enterprise solution that weaves innovation into core competencies to help you better serve customers, outpace the competition and expand profitability. You can optimize every facet of your operations from sales, omni-channel engagement, inventory and warehousing, to financials, value-add services and more. Infor solutions can help you accelerate the pace of business by managing transactions with unparalleled visibility across the enterprise, allowing for better informed and faster decision-making.

Deployment Options

Profile

Infor (infor.com), headquartered in New York, N.Y., USA, brought in $3.2 billion in revenue in 2019 and, with 67,000 customer organizations worldwide, is a leader in industry-specific cloud software products. The company has 140 offices across 44 countries and 17,000 employees. In 2020, Infor was acquired by Koch Industries.

CloudSuite™ Distribution Enterprise

Ultra's Insight: Fast Time-to-Value, Low Risk Solution

Infor CloudSuite Distribution Enterprise, also known as Infor M3, is a Tier 1 cloud-based enterprise software solution designed specifically for wholesale distribution. It is engineered to be a solution that works around the globe, with 31 languages available and 64 localizations.

Infor has been in the distribution industry for 30 years, and the three primary distribution micro-verticals that M3 thrives in are industrial supplies, professional trade supplies and food & beverage supplies. However, M3 is not just for distribution companies – it fits well for manufacturers as well.

Infor M3 is targeted to companies with revenues of $75 million and going into the multi-billions. There are always exceptions to the revenue ranges, but this range contains companies with the complexity and business requirements that are well-suited to M3. Infor M3 is delivered as a multi-tenant cloud solution using Amazon Web Services (AWS).

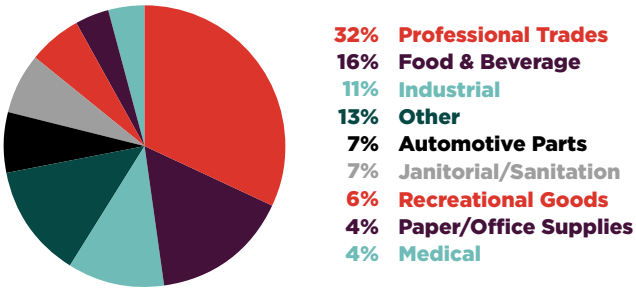
Infor M3 differentiates itself from the competition in several ways. First, M3 has a faster time-to-value because it offers pre-configured best-in-class industry-specific solutions. This allows the implementation team to deploy the solution faster with lower risk to the client. Another differentiator is the data that M3 can provide. This allows businesses to better leverage business intelligence, analytics and data science to make informed decisions and react faster – and utilize its "Coleman" AI tool. Infor M3 also has a fully integrated advanced Warehouse Management System as an option to any distributor with complex warehouse requirements.

Infor M3 is always advancing and improving its solution. There is transparency with the product roadmap and what enhancements to the solution are expected. The enhancements are rolled out monthly, which is on a much faster cadence then most ERP providers. This allows companies to get the benefits of enhancements faster. Infor M3 is adding new capabilities, new countries, and a new user experience as it serves its 4,000 distribution customers and guides them into the future.

KEY ERP SOFTWARE CAPABILITIES: Infor CloudSuite Distribution Enterprise

CATEGORY	FUNCTIONALITY	CLASSIFICATION	DEMONSTRATED INTEGRATIONS
Customer Management	CRM - Pipeline Management	Add-On	Infor Customer Lifecycle Mgmt
Customer Management	CRM - Marketing Management	Add-On	Infor Customer Lifecycle Mgmt
Customer Management	Customer Quotes	Core	
Customer Management	Customer Case Management	Add-On	Infor Customer Lifecycle Mgmt
Customer Management	Automated Sales Order Processing	Core	
Customer Management	Pricing, Rebates and Promotions	Core	
Customer Management	Customer Returns	Core	
Customer Management	Omni Channel Support	Core	
Customer Management	Point of Sales Support	Add-On	Infor Sales Hub
Customer Management	Sales Tax Calculation and Reporting	Core	
eCommerce	B2B Customer Portal	Add-On	Infor Rhythm for eComm
eCommerce	B2C Customer Website	Add-On	Infor Rhythm for eComm
Field Service	Field Service Mobile App	Add-On	Infor Mobile Field Service
Field Service	Field Service Management	Core	
Field Service	Warranty Management	Core	
Supply Chain Management	Qualitative Forecasting	Add-On	Infor DMP and more
Supply Chain Management	Demand Planning	Core	
Supply Chain Management	Distribution Resource Planning (DRP)	Core	
Supply Chain Management	Product Costing Methodologies	Core	
Supply Chain Management	Global Supply Chain Visibility	Core	
Procurement	Alternative Product Sourcing	Core	
Procurement	Automated Payables	Core	
Procurement	Vendor Returns	Core	
Product Management	Product Lifecycle Management (PLM)	Add-On	Infor PLM
Product Management	Product Data Management (PDM)/Product Information Management (PIM)	Core	
Product Management	GS1 GDSN Data Synchronization	Core	
Product Management	Product Profitability	Core	
Quality Management	Serial and/or Lot Control Track-and-Trace	Core	
Quality Management	Quality Compliance	Core	
Quality Management	Non-Conformance Management	Core	
Transportation Management	Small Parcel Processing	Core	
Transportation Management	Freight Bill Auditing	3-P	Soon to come Infor TMS
Transportation Management	Freight Asset Management	Core	
Transportation Management	Routing	Core	
Transportation Management	Dock scheduling	Add-On	Infor WMS
Transportation Management	Yard Management	Add-On	Infor WMS/YMS
Transportation Management	State Gas Tax Settlement	Core	
Warehouse/Inventory Management	Device/Mobile Scanning & Equipment Supported	Add-On	Infor Factory Track
Warehouse/Inventory Management	Real-Time Labor/Order Reporting	Add-On	Infor WMS
Warehouse/Inventory Management	Robust Cycle Counting	Core	
Warehouse/Inventory Management	Cross-Docking	Core	
Warehouse/Inventory Management	Warehouse Optimization	Add-On	Infor WMS
Warehouse/Inventory Management	Integration with Conveyors/Robotics (Whse Execution System integration)	Add-On	Infor WMS
Warehouse/Inventory Management	ASN Receiving	Core	
Warehouse/Inventory Management	Directed Putaway and Replenishment	Core	
Warehouse/Inventory Management	Shelf Life Management	Core	
Warehouse/Inventory Management	Variable/Catch Weight Management	Core	
Warehouse/Inventory Management	Task Interleaving	Add-On	Infor WMS
Warehouse/Inventory Management	Voice Enabled Picking	Add-On	Infor WMS
Warehouse/Inventory Management	Put/Pick to Light	Add-On	Infor WMS
Warehouse/Inventory Management	Value Add Services	Core	
Warehouse/Inventory Management	Kitting and Assembly	Core	

Distribution Customers by Industry



Targeted Distribution Verticals

- Automotive
- Building Materials
- Electrical
- Food & Beverage
- Industrial
- Janitorial/Sanitation
- Medical
- Plumbing/HVAC

Distribution Customers

- Atalanta Corporation
- Bargreen-Ellingson, Inc.
- EMCO Corporation
- Fetim Group
- Hilco Vision
- Oldcastle APG, Inc.
- Sutton Tools
- Vallen Asia

Infor's Pitch

CloudSuite Distribution Enterprise is an industry-leading ERP solution for wholesale distributors. It's built with capabilities designed specifically for the wholesale distribution industry. The solution provides an exceptional user experience and powerful analytics in a multi-company, multi-country and multi-site environment. This innovative, digital platform in the cloud enables distributors to continuously adopt new technologies and industry-specific capabilities.

Deployment Options

Profile

Infor (infor.com), headquartered in New York, N.Y., USA, brought in $3.2 billion in revenue in 2019 and, with 67,000 customer organizations worldwide, is a leader in industry-specific cloud software products. The company has 140 offices across 44 countries and 17,000 employees. In 2020, Infor was acquired by Koch Industries.

Ultra's Insight: Familiar Feel, Powerful SMB Toolset

Business Central is an ERP solution that is well suited for small and medium-sized companies. The software is designed to allow customers who have outgrown an entry-level ERP or home-grown solution from both a process and software perspective. Based on the Microsoft NAV on-premises software, Business Central takes advantage of a mature code set, while providing its customers the support and maintenance advantages of a cloud environment.

Another strength of Business Central is its use of the Microsoft architectural stack, which includes the integration to the Power Platform and Office 365 products, with single sign-on access to all products. The common look and feel of the Business Central software with Office 365 reduces the length of the learning curve for most users.

Use of the Microsoft stack also provides the flexibility to third-party providers to enhance Business Central's capabilities without risk of upgrade issues. Microsoft certifies third-party software to ensure that it runs with Business Central and provides Business Central customers with the ability to purchase 1,500 third-party apps from AppSource. On average, a Business Central Customer use two to five third-party apps to supplement the functionality of their initial implementation of the product. Many of the apps are developed to directly support the sub-verticals for various industries, including distribution.

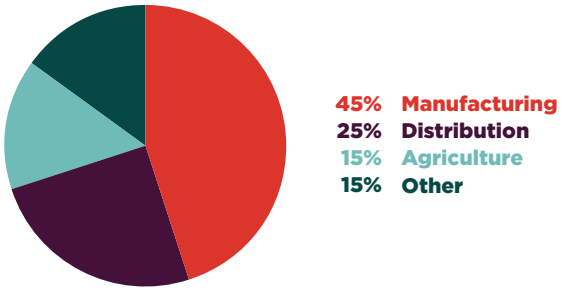
Business Central also has one of the more straight-forward pricing models, making it easier to understand the cost of ownership. Business Central is not purchased directly from Microsoft. Instead, customers go through a reseller that usually is contracted to support the implementation of the software.

The reseller that we spoke to for this report was Stoneridge Software. Although Business Central has multi-national capability, Stoneridge is focused on small and medium-sized customers whose headquarters are in North America and with under 50 locations. The firm is branching out into the international arena. Stoneridge brings a strong implementation methodology to a client's project, and has a dedicated client services team to support Business Central after implementation.

KEY ERP SOFTWARE CAPABILITIES: Microsoft Dynamics 365 Business Central

CATEGORY	FUNCTIONALITY	CLASSIFICATION	DEMONSTRATED INTEGRATIONS
Customer Management	CRM - Pipeline Management	Core	Dynamics 365 Sales
Customer Management	CRM - Marketing Management	Core	Dynamics 365 Marketing
Customer Management	Customer Quotes	Core	Dynamics 365 Sales or Business Central
Customer Management	Customer Case Management	Core	Dynamics 365 Customer Service
Customer Management	Automated Sales Order Processing	3-P	
Customer Management	Pricing, Rebates and Promotions	Core	
Customer Management	Customer Returns	Core	
Customer Management	Omni Channel Support	Core	Dynamics 365 Omnichannel
Customer Management	Point of Sales Support	3-P	
Customer Management	Sales Tax Calculation and Reporting	Core	
eCommerce	B2B Customer Portal	Core	Dynamics 365
eCommerce	B2C Customer Website	3-P	Integration to many ecommerce platforms
Field Service	Field Service Mobile App	Core	Dynamics 365 Field Service
Field Service	Field Service Management	Core	Dynamics 365 Field Service
Field Service	Warranty Management	Core	Dynamics 365 Field Service or Business Central
Supply Chain Management	Qualitative Forecasting	3-P	
Supply Chain Management	Demand Planning	Core	
Supply Chain Management	Distribution Resource Planning (DRP)	Core	
Supply Chain Management	Product Costing Methodologies	Core	
Supply Chain Management	Global Supply Chain Visibility	3-P	
Procurement	Alternative Product Sourcing	Core	
Procurement	Automated Payables	Core	
Procurement	Vendor Returns	Core	
Product Management	Product Lifecycle Management (PLM)	3-P	
Product Management	Product Data Management (PDM)/Product Information Management (PIM)	3-P	
Product Management	GS1 GDSN Data Synchronization	None	Customization
Product Management	Product Profitability	Core	
Quality Management	Serial and/or Lot Control Track-and-Trace	Core	
Quality Management	Quality Compliance	3-P	
Quality Management	Non-Conformance Management	3-P	
Transportation Management	Small Parcel Processing	3-P	
Transportation Management	Freight Bill Auditing	3-P	
Transportation Management	Freight Asset Management	3-P	
Transportation Management	Routing	3-P	
Transportation Management	Dock scheduling	3-P	
Transportation Management	Yard Management	3-P	
Transportation Management	State Gas Tax Settlement	3-P	
Warehouse/Inventory Management	Device/Mobile Scanning & Equipment Supported	3-P	
Warehouse/Inventory Management	Real-Time Labor/Order Reporting	Core	
Warehouse/Inventory Management	Robust Cycle Counting	Core	
Warehouse/Inventory Management	Cross-Docking	Core	
Warehouse/Inventory Management	Warehouse Optimization	Core	
Warehouse/Inventory Management	Integration with Conveyors/Robotics (Whse Execution System integration)	3-P	
Warehouse/Inventory Management	ASN Receiving	3-P	
Warehouse/Inventory Management	Directed Putaway and Replenishment	Core	
Warehouse/Inventory Management	Shelf Life Management	Core	
Warehouse/Inventory Management	Variable/Catch Weight Management	3-P	
Warehouse/Inventory Management	Task Interleaving	3-P	
Warehouse/Inventory Management	Voice Enabled Picking	3-P	
Warehouse/Inventory Management	Put/Pick to Light	3-P	
Warehouse/Inventory Management	Value Add Services	3-P	
Warehouse/Inventory Management	Kitting and Assembly	Core	

Customers by Industry



Targeted Distribution Verticals

- Agriculture (Seed, Commodity)
- Chemical/Pharma
- Food
- Industrial Equipment
- Medical Suppliers (Device and Supplies)

Distribution Customers

- Crest Healthcare
- LeisureQuip, Inc.
- Intercomp Company
- Katom Restaurant Supply, Inc.
- Sea-Land Distributors
- Varitronics LLC

Stoneridge's Microsoft Pitch

Stoneridge Software represents the full suite of Microsoft Dynamics business applications, including Business Central and the Customer Engagement solutions, and the Power Platform, with specific expertise in distribution. There's no one better at ERP + CRM integrations and providing a migration path from on-premises to cloud software.

The experienced Stoneridge team accomplishes successful projects through brain power, grit and a proven process for implementation. Guidance and support are provided for our client community throughout implementation and beyond. We help clients win through intentional leadership, thoughtful teaching and eye-opening possibilities.

Deployment Options

Microsoft Profile

Microsoft (microsoft.com) is headquartered in Redmond, Wash., USA, and was founded in 1975. In FY 2020, the company had $143.0 billion in revenue and 175,500 employees worldwide. It is the world's largest software company. Its Microsoft Dynamics 365 enterprise resource planning (ERP) product line contains a long list of applications, including Dynamics 365 Business Central, which is designed for small and medium-sized businesses.

Stoneridge Software Profile

Stoneridge Software (stoneridgesoftware.com) offers business solutions built on Microsoft Dynamics 365, and is focused on the agriculture, manufacturing, construction and distribution industries. A Microsoft Gold Partner, the firm also was named to Microsoft's Inner Circle for ranking in the top 1% of partners worldwide. Headquartered in Barnesville, Minn., USA, the firm was founded in 2012.

Ultra's Insight: Big Platform and Broad Functionality

Microsoft is the largest software company in the world, and thus provides a stable company with a sizeable research and development budget. In the ERP environment, Microsoft strives to provide 85% to 90% of functionality in its core product, and then relies on its business partners and ISVs to provide the remaining, industry-specific functionality.

Microsoft Dynamics 365's strength lies in its ability to offer a comprehensive set of functionalities including robust warehouse and transportation management and eCommerce solutions.

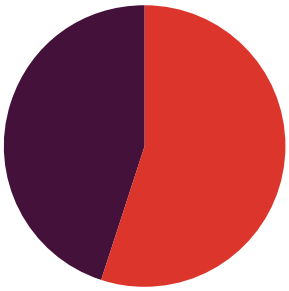
Argano is a Microsoft Gold Certified Partner across multiple areas of business in Microsoft technologies, and is an Inner Circle Partner representing the top 2% of global Microsoft Dynamics partners. It has been delivering strategic consulting services for more than 15 years, with 100-plus implementations to 26,000-plus Dynamics 365 client users. Its sweet spot are customers with revenues between $200M to $2B and 200 to 2,000 employees.

With deep experience in Microsoft Dynamics 365 Supply Chain Management, Microsoft solutions, and its own custom extensions, Argano helps transform distribution companies by modernizing and automating distribution center operations, utilizing the power of IoT to capture more actionable data, empowering clients with a 24/7/365, 360-degree view of every step in their supply chain.

KEY ERP SOFTWARE CAPABILITIES: Microsoft Dynamics 365 Finance & Operations

CATEGORY	FUNCTIONALITY	CLASSIFICATION	DEMONSTRATED INTEGRATIONS
Customer Management	CRM - Pipeline Management	Core	
Customer Management	CRM - Marketing Management	Core	
Customer Management	Customer Quotes	Core	
Customer Management	Customer Case Management	Core	
Customer Management	Automated Sales Order Processing	Core	
Customer Management	Pricing, Rebates and Promotions	Core	
Customer Management	Customer Returns	Core	
Customer Management	Omni Channel Support	Core	
Customer Management	Point of Sales Support	Core	
Customer Management	Sales Tax Calculation and Reporting	Core	
eCommerce	B2B Customer Portal	Core	
eCommerce	B2C Customer Website	Core	
Field Service	Field Service Mobile App	Core	
Field Service	Field Service Management	Core	
Field Service	Warranty Management	3-P	
Supply Chain Management	Qualitative Forecasting	3-P	
Supply Chain Management	Demand Planning	Core	
Supply Chain Management	Distribution Resource Planning (DRP)	Core	
Supply Chain Management	Product Costing Methodologies	Core	
Supply Chain Management	Global Supply Chain Visibility	Core	
Procurement	Alternative Product Sourcing	Core	
Procurement	Automated Payables	Core	
Procurement	Vendor Returns	Core	
Product Management	Product Lifecycle Management (PLM)	Core	
Product Management	Product Data Management (PDM)/Product Information Management (PIM)	Core	
Product Management	GS1 GDSN Data Synchronization	Core	
Product Management	Product Profitability	Core	
Quality Management	Serial and/or Lot Control Track-and-Trace	Core	
Quality Management	Quality Compliance	Core	
Quality Management	Non-Conformance Management	Core	
Transportation Management	Small Parcel Processing	Core	
Transportation Management	Freight Bill Auditing	Core	
Transportation Management	Freight Asset Management	Core	
Transportation Management	Routing	3-P	
Transportation Management	Dock scheduling	Core	
Transportation Management	Yard Management	3-P	
Transportation Management	State Gas Tax Settlement	None	
Warehouse/Inventory Management	Device/Mobile Scanning & Equipment Supported	Core	
Warehouse/Inventory Management	Real-Time Labor/Order Reporting	3-P	
Warehouse/Inventory Management	Robust Cycle Counting	Core	
Warehouse/Inventory Management	Cross-Docking	Core	
Warehouse/Inventory Management	Warehouse Optimization	Core	
Warehouse/Inventory Management	Integration with Conveyors/Robotics (Whse Execution System integration)	3-P	
Warehouse/Inventory Management	ASN Receiving	3-P	
Warehouse/Inventory Management	Directed Putaway and Replenishment	Core	
Warehouse/Inventory Management	Shelf Life Management	Core	
Warehouse/Inventory Management	Variable/Catch Weight Management	Core	
Warehouse/Inventory Management	Task Interleaving	None	
Warehouse/Inventory Management	Voice Enabled Picking	3-P	
Warehouse/Inventory Management	Put/Pick to Light	3-P	
Warehouse/Inventory Management	Value Add Services	Core	
Warehouse/Inventory Management	Kitting and Assembly	Core	

Customers by Industry



Targeted Distribution Verticals

- Consumer Packaged Goods
- Retail Distribution
- Wholesale Distribution

Distribution Customers

- Anaergia
- Copper State
- FBM (Foundation Building Materials)
- JMP
- Magpul
- McWane
- Nexgrill

Argano's Microsoft Pitch

Argano Technologies/Arbela combines industry expertise, best practices, and a proven, outcome-driven approach to ignite business growth for distribution and alike organizations worldwide. Through strategic alignment of people, processes, data, and technology, we enable our clients to accelerate their business by building a more resilient supply chain, optimizing operations, and improving the customer experience.

As a global consulting firm and top Microsoft partner, our team of experienced consultants provide strategic guidance, implementation services, support, and managed services. We deliver industry solutions that help our clients innovate by leveraging Microsoft Dynamics 365, ERP, CRM, business intelligence and advanced analytics, Microsoft Power Platform, and related cloud services.

Deployment Options

Microsoft Profile

Microsoft (microsoft.com) is headquartered in Redmond, Wash., USA, and was founded in 1975. In FY 2020, the company had $143.0 billion in revenue and 175,500 employees worldwide. It is the world's largest software company. Its Microsoft Dynamics 365 enterprise resource planning (ERP) product line contains a long list of applications, including Dynamics 365 Business Central, which is designed for small and medium-sized businesses.

Argano Profile

Argano Technologies (argano.com) acquired Arbela in June 2021. Arbela is a global consulting firm, a top-rated Microsoft Gold Certified Partner, and an experienced Microsoft Dynamics 365 implementor. Headquartered in Irvine, Calif., USA, the firm has U.S. offices in Atlanta and Dallas, as well as offices in the United Kingdom, Ukraine and Denmark.

Ultra's Insight: Smart Choice for Complex Environments

Oracle Cloud is Oracle's ERP solution focused on customers with revenues $200 million and above. It has found that its best clients are embarking on major transformations – and often the bigger the client, the more complex environment, the better the fit. Oracle Cloud is a single-tenant solution built in such a way that all the modules can operate independently, integrate seamlessly or plug-and-play with best-in-class solutions.

Oracle's Warehouse Management System (WMS), formerly LogFire, maintains high availability, and is easily scalable. Its functionality is appropriate for pure distributors, 3PL operations, retailers and manufacturers with heavy distribution requirements.

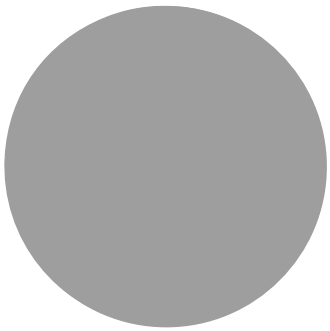
In our client software selections, Oracle's Transportation Management System (TMS) solution never has gaps in functionality or issues with flexibility. Recently, new functionality was rolled out that leverages machine learning technology to help identify accurate ETAs on shipments. The TMS solution also includes logistics modeling and strategic network optimization functionality. IoT is already integrated with both WMS and TMS.

Terillium, an Oracle Platinum Partner, specializes in helping businesses implement state-of-the-art technology solutions including Oracle Cloud, Oracle NetSuite and Oracle JDEdwards. It has helped more than 700 businesses in the United States as a trusted advisor and ERP consulting partner. It has 200-plus employees in the United States who average 16 years of ERP experience. In addition to being a Cloud Excellence Implementer for Oracle Cloud, Terillium provides managed services and cloud migrations.

KEY ERP SOFTWARE CAPABILITIES: Oracle Cloud

CATEGORY	FUNCTIONALITY	CLASSIFICATION	DEMONSTRATED INTEGRATIONS
Customer Management	CRM - Pipeline Management	Core	
Customer Management	CRM - Marketing Management	Core	
Customer Management	Customer Quotes	Core	
Customer Management	Customer Case Management	Core	
Customer Management	Automated Sales Order Processing	Core	
Customer Management	Pricing, Rebates and Promotions	Core	
Customer Management	Customer Returns	Core	
Customer Management	Omni Channel Support	Core	
Customer Management	Point of Sales Support	Core	Oracle Commerce Cloud, Oracle Micros
Customer Management	Sales Tax Calculation and Reporting	Core	Vertex, Avalara
eCommerce	B2B Customer Portal	Core	
eCommerce	B2C Customer Website	Core	
Field Service	Field Service Mobile App	Core	
Field Service	Field Service Management	Core	
Field Service	Warranty Management	Core	
Supply Chain Management	Qualitative Forecasting	Core	
Supply Chain Management	Demand Planning	Core	
Supply Chain Management	Distribution Resource Planning (DRP)	Core	
Supply Chain Management	Product Costing Methodologies	Core	
Supply Chain Management	Global Supply Chain Visibility	Core	
Procurement	Alternative Product Sourcing	Core	
Procurement	Automated Payables	Core	
Procurement	Vendor Returns	Core	
Product Management	Product Lifecycle Management (PLM)	Core	
Product Management	Product Data Management (PDM)/Product Information Management (PIM)	Core	
Product Management	GS1 GDSN Data Synchronization	Add-On	
Product Management	Product Profitability	Core	
Quality Management	Serial and/or Lot Control Track-and-Trace	Core	
Quality Management	Quality Compliance	Core	
Quality Management	Non-Conformance Management	Core	
Transportation Management	Small Parcel Processing	Core	
Transportation Management	Freight Bill Auditing	Core	
Transportation Management	Freight Asset Management	Core	
Transportation Management	Routing	Core	
Transportation Management	Dock scheduling	Core	
Transportation Management	Yard Management	Core	
Transportation Management	State Gas Tax Settlement	Core	
Warehouse/Inventory Management	Device/Mobile Scanning & Equipment Supported	Core	
Warehouse/Inventory Management	Real-Time Labor/Order Reporting	Core	
Warehouse/Inventory Management	Robust Cycle Counting	Core	
Warehouse/Inventory Management	Cross-Docking	Core	
Warehouse/Inventory Management	Warehouse Optimization	Core	
Warehouse/Inventory Management	Integration with Conveyors/Robotics (Whse Execution System integration)	Core	WCS systems needed depending on device
Warehouse/Inventory Management	ASN Receiving	Core	
Warehouse/Inventory Management	Directed Putaway and Replenishment	Core	
Warehouse/Inventory Management	Shelf Life Management	Core	
Warehouse/Inventory Management	Variable/Catch Weight Management	Add-On	
Warehouse/Inventory Management	Task Interleaving	Core	
Warehouse/Inventory Management	Voice Enabled Picking	3-P	Vocallect Voice through Oracle WMS/ Logfire
Warehouse/Inventory Management	Put/Pick to Light	Core	WCS systems needed depending on device
Warehouse/Inventory Management	Value Add Services	None	
Warehouse/Inventory Management	Kitting and Assembly	Core	

Customers by Industry



Data not provided

Targeted Verticals

- Automotive
- Construction and Engineering
- Consumer Goods
- Food and Beverage
- High Technology
- Industrial Manufacturing
- Life Sciences
- Transportation & Logistics

Distribution Customers

(Data not provided)

Terillium's Oracle Pitch

With a complete SaaS suite of applications built with AI and machine learning across all business functions, you get the latest advances in the best technology – ready when you need it.

You don't have to compromise by choosing between breadth and depth or short-term needs and long-term priorities. Deep integrations between applications, as well as a common data model, common workflow engine, and a consistent user interface ensure that data is not trapped in silos.

With the most comprehensive and robust technology portfolio, unmatched security, and future-proof innovations built in. Oracle's complete SaaS suite helps you outpace change and be ready for the future.

Deployment Options

Oracle Profile

Oracle (oracle.com) is headquartered in Austin, Texas, USA, and was founded in 1977. In 2020, the company had $39.1 billion in revenue, 430,000 customers, 133,000 employees and 20,000 partners around the world. Oracle claims that it offers the broadest and deepest suite of cloud applications. In 2020, Oracle was the second-largest software company by revenue and market capitalization.

Terillium Profile

Terillium (terillium.com) is an ERP consulting company and Oracle Platinum Partner specializing in the implementation of Oracle ERP Cloud, Oracle NetSuite and Oracle JD Edwards solutions. With more than 200 employees at locations across the United States and its Cincinnati, Ohio, USA, headquarters.

Ultra's Insight: Easy to Implement and Customize

NetSuite was acquired by Oracle in 2016. Unlike many of the Oracle purchases, Oracle has invested heavily in NetSuite as its own global organization, with a focus on the small to medium-sized market. This has resulted in an increase in both presence, through growing staff, and functionality for the product. NetSuite has added more than 6,000 new customers in the last year.

Historically, most of NetSuite's customer base has been in North America. However, this has changed with an ever-growing international market that NetSuite supports with 27 languages and localizations. In addition, more than 51% of its North American customer base operates in multiple countries.

NetSuite is built as a single database solution that has evolved through enrichment of the core functionality, not through acquisition of complementary software. The single database allows NetSuite to offer a simpler pricing model where you purchase the full functionality of the product. NetSuite also allows you to jumpstart implementation through access to SuiteSuccess – bundles of pre-configurations created specifically for industry sub-verticals. Highly configurable software also allows NetSuite customers to avoid customization through personalization gained through configuration.

If you do not find the specific functionality that you need within NetSuite, there is also SuiteApp.com. This is a marketplace managed by NetSuite where customers can find third-party apps that can be fully integrated into NetSuite. NetSuite works with the partner companies on SuiteApp.com to ensure that their software works with NetSuite, even after software upgrades are pushed by NetSuite.

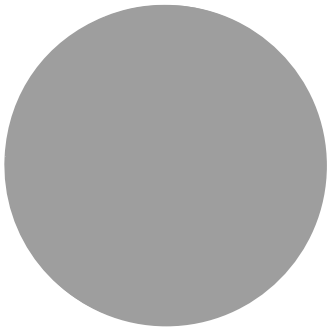
Major upgrades occur twice per year, with minor upgrades or bug fixes pushed out more immediately. Sometimes new upgrades provide functionality that customers want to try before they implement. NetSuite provides training and a sandbox to customers to determine if they want to add it to their business processes or want to ignore it.

In short, NetSuite's competitive advantages are its speed to implementation and ability to easily find pre-developed customizations through SuiteApp.com. Its cloud structure and ease of configuration make it a good solution for the distribution company that does not have a deep IT bench for either implementation or ongoing support.

KEY ERP SOFTWARE CAPABILITIES: Oracle NetSuite

CATEGORY	FUNCTIONALITY	CLASSIFICATION	DEMONSTRATED INTEGRATIONS
Customer Management	CRM - Pipeline Management	Core	
Customer Management	CRM - Marketing Management	Core	
Customer Management	Customer Quotes	Core	
Customer Management	Customer Case Management	Core	
Customer Management	Automated Sales Order Processing	Core	
Customer Management	Pricing, Rebates and Promotions	Core	
Customer Management	Customer Returns	Core	
Customer Management	Omni Channel Support	Core	
Customer Management	Point of Sales Support	Core	
Customer Management	Sales Tax Calculation and Reporting	Core	
eCommerce	B2B Customer Portal	Core	
eCommerce	B2C Customer Website	Core	
Field Service	Field Service Mobile App	3-P	Multiple
Field Service	Field Service Management	3-P	Multiple
Field Service	Warranty Management	Core	
Supply Chain Management	Qualitative Forecasting	Add-On	NetSuite P&B or 3-P
Supply Chain Management	Demand Planning	Core	
Supply Chain Management	Distribution Resource Planning (DRP)	Core	
Supply Chain Management	Product Costing Methodologies	Core	
Supply Chain Management	Global Supply Chain Visibility	Core	
Procurement	Alternative Product Sourcing	Core	
Procurement	Automated Payables	Core	
Procurement	Vendor Returns	Core	
Product Management	Product Lifecycle Management (PLM)	3-P	Multiple
Product Management	Product Data Management (PDM)/Product Information Management (PIM)	3-P	Multiple
Product Management	GS1 GDSN Data Synchronization	3-P	Multiple
Product Management	Product Profitability	Core	
Quality Management	Serial and/or Lot Control Track-and-Trace	Core	
Quality Management	Quality Compliance	Core	
Quality Management	Non-Conformance Management	Core	
Transportation Management	Small Parcel Processing	Core	
Transportation Management	Freight Bill Auditing	3-P	Multiple
Transportation Management	Freight Asset Management	3-P	Multiple
Transportation Management	Routing	Core	Advanced requires partner
Transportation Management	Dock scheduling	Add-On	Oracle Cloud WMS (LogFire) or 3-P
Transportation Management	Yard Management	3-P	Multiple
Transportation Management	State Gas Tax Settlement	3-P	Multiple
Warehouse/Inventory Management	Device/Mobile Scanning & Equipment Supported	Core	3-P or WMS partner
Warehouse/Inventory Management	Real-Time Labor/Order Reporting	Core	
Warehouse/Inventory Management	Robust Cycle Counting	Core	
Warehouse/Inventory Management	Cross-Docking	Add-On	Oracle Cloud WMS (LogFire) or 3-P
Warehouse/Inventory Management	Warehouse Optimization	Add-On	Oracle Cloud WMS (LogFire) or 3-P
Warehouse/Inventory Management	Integration with Conveyors/Robotics (Whse Execution System integration)	Add-On	Oracle Cloud WMS (LogFire) or 3-P
Warehouse/Inventory Management	ASN Receiving	Core	
Warehouse/Inventory Management	Directed Putaway and Replenishment	Core	
Warehouse/Inventory Management	Shelf Life Management	Core	
Warehouse/Inventory Management	Variable/Catch Weight Management	Core	
Warehouse/Inventory Management	Task Interleaving	Add-On	Oracle Cloud WMS (LogFire) or 3-P
Warehouse/Inventory Management	Voice Enabled Picking	Add-On	Oracle Cloud WMS (LogFire) or 3-P
Warehouse/Inventory Management	Put/Pick to Light	Add-On	Oracle Cloud WMS (LogFire) or 3-P
Warehouse/Inventory Management	Value Add Services	Core	
Warehouse/Inventory Management	Kitting and Assembly	Core	

Customers by Industry



Data not provided

Targeted Verticals

- Apparel & Footwear
- Food & Beverage
- Manufacturing
- Non-Profits
- Professional Services
- Retail
- Software
- Wholesale/Distribution

Distribution Customers

- Bailey Hydraulics
- Big Agnes
- Camp Chef
- EZ-LOK
- Precision Medical Products
- Regina Andrew Design

Oracle NetSuite's Pitch

Make smarter, faster decisions using the world's most deployed cloud ERP – and join NetSuite's 27,000-plus customers (6,000-plus new customers for the year ending May 31, 2021).

Engineered to streamline mission-critical processes. Allowing businesses to focus on what they do best and react to new market opportunities, swiftly and confidently. From financials to supply chain management to billing, NetSuite provides clear visibility and control.

NetSuite's customers manage subsidiaries, business units, legal entities, domestic or international with a single solution. Ninety-nine percent of customers utilize multiple currencies, 50%-plus of customers transact in more than one country, with 27 different languages.

Standardize processes, gain visibility across geographies and ensure compliance.

Deployment Options

Profile

Oracle (oracle.com) is headquartered in Austin, Texas, USA, and was founded in 1977. In 2020, the company had $39.1 billion in revenue, 430,000 customers, 133,000 employees and 20,000 partners around the world. In 2020, Oracle was the second-largest software company by revenue and market capitalization.

Ultra's Insight: Flexible Solution for Complex Businesses

Sage X3 is a well-established ERP solution that has been serving customers for more than 20 years. Sage X3 has 600 North American customers, with 80% of those customers being in the United States, and the balance in Canada.

Sage X3 focuses on the manufacturing and distribution industries, and particularly companies with the "multis." Any company with the complexity of being a multi-national, multi-language, multi-currency operation, or has multiple entities is an excellent fit for the Sage X3 solution.

The ideal company size for Sage X3 are companies with around $30 million in revenue or higher, and have at least 50 employees. Companies with international supply chain complexity are a particularly good fit, such as furniture distributors managing the flow of inventory from manufacturing locations oversees (or having a vendor manage it but have access to their ERP system) and then handling distribution from warehouses in the United States or Canada.

Sage X3 used to be primarily an on-premises solution. But over the past few years, Sage has seen its customer base shift to being 80% cloud. Sage X3 offers a single-tenant cloud solution using Amazon Web Services (AWS) or a third-party hosting provider.

The competitive advantage that Sage X3 provides to customers is the ability to collect and access data and then share it across the entire enterprise. The WMS portion of Sage X3 is a strong out-of-the-box solution that often exceeds the functionality of the competition. Sage X3 continues to develop their WMS solution and is adding even more functionality to strengthen its inventory management functionality around barcoding, license plate tracking and picking.

Sage X3 releases updates to its ERP on a quarterly basis, which, compared to semi-annual updates, provides customers with faster access to new functionalities.

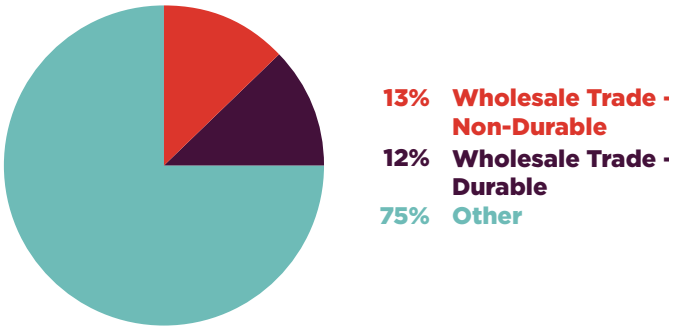
Sage Customer Service and strong ecosystem of Value-Added Resellers provide the support customers need to make the most of their investment. Customers should expect not only to have great customer service, but reduced inventory carrying costs, access to an extensive ISV ecosystem and strong WMS functionality.

For Sage X3, the more complex the customer's business the better, as its flexibility is an advantage over the competition.

KEY ERP SOFTWARE CAPABILITIES: Sage X3

CATEGORY	FUNCTIONALITY	CLASSIFICATION	DEMONSTRATED INTEGRATIONS
Customer Management	CRM - Pipeline Management	Core	
Customer Management	CRM - Marketing Management	Core	
Customer Management	Customer Quotes	Core	
Customer Management	Customer Case Management	Core	
Customer Management	Automated Sales Order Processing	Core	
Customer Management	Pricing, Rebates and Promotions	Core	
Customer Management	Customer Returns	Core	
Customer Management	Omni Channel Support	Core	
Customer Management	Point of Sales Support	3-P	Ivend
Customer Management	Sales Tax Calculation and Reporting	3-P	Avalara
eCommerce	B2B Customer Portal	3-P	Commerce Build/Megento
eCommerce	B2C Customer Website	3-P	Commerce Build/Megento
Field Service	Field Service Mobile App	Core	
Field Service	Field Service Management	Core	
Field Service	Warranty Management	Core	
Supply Chain Management	Qualitative Forecasting	Add-On	Sage Inventory Advisor
Supply Chain Management	Demand Planning	Core	
Supply Chain Management	Distribution Resource Planning (DRP)	None	SAGE MRP
Supply Chain Management	Product Costing Methodologies	Core	
Supply Chain Management	Global Supply Chain Visibility	Core	
Procurement	Alternative Product Sourcing	Core	
Procurement	Automated Payables	3-P	AI-Tec OCR
Procurement	Vendor Returns	Core	
Product Management	Product Lifecycle Management (PLM)	None	
Product Management	Product Data Management (PDM)/Product Information Management (PIM)	Core	
Product Management	GS1 GDSN Data Synchronization	3-P	True Commerce
Product Management	Product Profitability	Core	
Quality Management	Serial and/or Lot Control Track-and-Trace	Core	
Quality Management	Quality Compliance	Core	
Quality Management	Non-Conformance Management	Core	
Transportation Management	Small Parcel Processing	Core	
Transportation Management	Freight Bill Auditing	3-P	Process Weaver
Transportation Management	Freight Asset Management	3-P	TEMA
Transportation Management	Routing	3-P	TEMA
Transportation Management	Dock scheduling	Core	
Transportation Management	Yard Management	Core	
Transportation Management	State Gas Tax Settlement	None	
Warehouse/Inventory Management	Device/Mobile Scanning & Equipment Supported	Add-On	ADC
Warehouse/Inventory Management	Real-Time Labor/Order Reporting	None	
Warehouse/Inventory Management	Robust Cycle Counting	Core	
Warehouse/Inventory Management	Cross-Docking	Core	
Warehouse/Inventory Management	Warehouse Optimization	Core	
Warehouse/Inventory Management	Integration with Conveyors/Robotics (Whse Execution System integration)	Add-On	With Web Services
Warehouse/Inventory Management	ASN Receiving	3-P	
Warehouse/Inventory Management	Directed Putaway and Replenishment	Core	Available Q4 2021
Warehouse/Inventory Management	Shelf Life Management	Core	
Warehouse/Inventory Management	Variable/Catch Weight Management	None	
Warehouse/Inventory Management	Task Interleaving	None	
Warehouse/Inventory Management	Voice Enabled Picking	None	
Warehouse/Inventory Management	Put/Pick to Light	None	
Warehouse/Inventory Management	Value Add Services	None	
Warehouse/Inventory Management	Kitting and Assembly	Core	

Customers by Industry



Targeted Distribution Verticals

- Wholesale Trade – Non-Durable
- Wholesale Trade – Durable

Distribution Customers

(Data not provided)

Sage's Pitch

Sage X3 provides faster, more intuitive and tailored business management solutions for product-centric organizations looking to thrive and stay competitive in the face of growing complexity. Sage X3 transforms how organizations manage people, processes and operations, allowing them to embrace change at speed.

Sage X3 helps your business to thrive and stay competitive by providing users with the information they need to serve their customers better, to take back control over quality, and to eliminate inefficiencies across the organization. It streamlines your core processes – from manufacturing to distribution and financial management to business services – while adapting to your industries best practices.

Deployment Options

Profile

Sage Group plc (sage.com) is headquartered in the United Kingdom, and its U.S. office is in Atlanta, Ga. Sage is the world's third-largest supplier of ERP software, with $2 billion in annual revenue, 6.1 million customers worldwide, products/services available in 160 countries, and offices in 24 countries.

Ultra's Insight: Reliable, Scalable, Flexible and Extensible

SAP Business One is the small- to mid-market solution. Business One has around 72,000 different companies running its ERP globally, including customers in Russia, China and Europe. However, 75% of the client base is located in North America. The ideal distributor size for SAP Business One is between $20 million and $250 million in revenue (with flexibility to go higher or lower), and 50 to 100 office workers and 15 to 75 warehouse workers.

SAP Business One focuses on a few sub-verticals within distribution, including durable goods, food and electrical, with most of their customers being B2B companies. SAP Business One comes with 43 localizations and is offered in 27 different languages, making it a strong player for global companies. SAP Business One was originally engineered to be a on-premises solution, but now also is offered as a single- or multi-tenant cloud solution. This flexibility is a differentiator for SAP.

SAP has an extensive partner network with specific industry experience. SAP is investing in SAP Business One to bring new functionality to the solution, which it does using quarterly patch updates or upgrades that occur approximately every 18 months. Some new functionality in the latest release was around forecasting, mobile devices and improving APIs to allow for automation such as robots and conveyors. Last, SAP Business One has the ability to handle large transaction volumes without impacting performance.

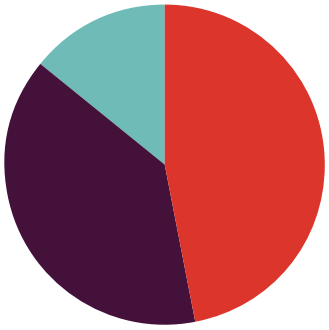
When the core SAP Business One product does not meet all of a customer's needs, that is where a partner like Vision33 comes in. Vision33 not only has extensive knowledge of Business One, but it also has a network of add-ons, such as WMS and TMS solutions, that it is able to implement so customers only have to deal with one partner. Vision33 also has integration tool – called Saltbox – that allows any third-party software with an API to integrate with SAP Business One.

SAP Business One provides its customers with a scalable solution to grow as they grow. It gives them access to data and the ability to perform data analytics. Vision33 has tools and configurations of SAP Business One to get customers on the new system within a year, sometimes faster if the operations of the company are simple.

KEY ERP SOFTWARE CAPABILITIES: SAP Business One

CATEGORY	FUNCTIONALITY	CLASSIFICATION	DEMONSTRATED INTEGRATIONS
Customer Management	CRM - Pipeline Management	Core	
Customer Management	CRM - Marketing Management	Core	
Customer Management	Customer Quotes	Core	
Customer Management	Customer Case Management	Core	
Customer Management	Automated Sales Order Processing	Core	
Customer Management	Pricing, Rebates and Promotions	Core	
Customer Management	Customer Returns	Core	
Customer Management	Omni Channel Support	Core	
Customer Management	Point of Sales Support	3-P	Square, iVend, Retail Pro
Customer Management	Sales Tax Calculation and Reporting	3-P	Avalara (for enhanced capabilites)
eCommerce	B2B Customer Portal	Add-On	V33 Product
eCommerce	B2C Customer Website	Add-On	V33 Product
Field Service	Field Service Mobile App	Core	
Field Service	Field Service Management	Core	
Field Service	Warranty Management	Core	
Supply Chain Management	Qualitative Forecasting	Core	
Supply Chain Management	Demand Planning	Core	
Supply Chain Management	Distribution Resource Planning (DRP)	Core	
Supply Chain Management	Product Costing Methodologies	Core	
Supply Chain Management	Global Supply Chain Visibility	Core	
Procurement	Alternative Product Sourcing	Core	
Procurement	Automated Payables	Core	
Procurement	Vendor Returns	Core	
Product Management	Product Lifecycle Management (PLM)	3-P	
Product Management	Product Data Management (PDM)/Product Information Management (PIM)	3-P	
Product Management	GS1 GDSN Data Synchronization	3-P	V33 Product SaltBox
Product Management	Product Profitability	Core	
Quality Management	Serial and/or Lot Control Track-and-Trace	Core	
Quality Management	Quality Compliance	3-P	Boyum Inspect
Quality Management	Non-Conformance Management	None	
Transportation Management	Small Parcel Processing	3-P	Shipstation, Process Weaver Shipping
Transportation Management	Freight Bill Auditing	3-P	Process Weaver
Transportation Management	Freight Asset Management	3-P	Process Weaver
Transportation Management	Routing	3-P	Process Weaver
Transportation Management	Dock scheduling	None	
Transportation Management	Yard Management	None	
Transportation Management	State Gas Tax Settlement	None	
Warehouse/Inventory Management	Device/Mobile Scanning & Equipment Supported	3-P	Zebra, Motorola, Symbol, Honeywell
Warehouse/Inventory Management	Real-Time Labor/Order Reporting	Core	
Warehouse/Inventory Management	Robust Cycle Counting	Core	
Warehouse/Inventory Management	Cross-Docking	3-P	Produmex WMS
Warehouse/Inventory Management	Warehouse Optimization	None	
Warehouse/Inventory Management	Integration with Conveyors/Robotics (Whse Execution System integration)	3-P	Produmex WMS
Warehouse/Inventory Management	ASN Receiving	3-P	Produmex WMS
Warehouse/Inventory Management	Directed Putaway and Replenishment	3-P	Produmex WMS
Warehouse/Inventory Management	Shelf Life Management	3-P	Produmex WMS
Warehouse/Inventory Management	Variable/Catch Weight Management	3-P	Produmex WMS
Warehouse/Inventory Management	Task Interleaving	3-P	Produmex WMS
Warehouse/Inventory Management	Voice Enabled Picking	None	
Warehouse/Inventory Management	Put/Pick to Light	3-P	Produmex WMS
Warehouse/Inventory Management	Value Add Services	Core	
Warehouse/Inventory Management	Kitting and Assembly	Core	

Customers by Industry



47% Distribution
39% Manufacturing
14% Other

Targeted Distribution Verticals

- Durable Goods
- Food and Beverage
- Furniture
- Industrial Machinery and Equipment
- Medical Device
- Motor Vehicle Parts and Supplies
- Professional Equipment and Supplies
- Sporting/Recreational Goods

Distribution Customers

- Air Power Inc
- CB Medical
- Herco Group
- Hummert International
- Staub Electronics
- Superior Auto Extras
- Tazaki Foods
- Tolteca Foods
- Trison, LLC

Vision33's SAP Pitch

Vision33 Inc. is a global company that helps growing companies transform how they operate through automation and integration solutions. We partner with growing and large organizations in both the private and public sectors to understand their vision and help them attain it with the right blend of strategy, consulting, and technology. Our work spans all major industries. Vision33 employs over 500 results-driven people globally to provide world-class experience through our office locations across North America and Europe. Providing their customers with the certified SAP solution, SAP Business One, Vision33 helps companies gain new customers, grow revenue, improve productivity and stay competitive.

Deployment Options

SAP Profile

SAP (sap.com) is headquartered in Walldorf, Germany, and was founded in 1972. The company had $32.2 billion in revenue in FY2020, and in July 2021 it had 440,000 customers, regional offices in 140 countries, 103,876 employees and 21,000 partners around the world. The company says that more than 75% of the world's transaction revenue touches an SAP system, and that approximately 80% of SAP customers are small and medium-sized enterprises.

Vision33 Profile

Vision33 (vision33.com) is an SAP Gold Partner and SAP Business One services provider. Headquartered in Irvine, Calif., USA, the firm has offices 22 offices in the United States, six in Canada and three in Europe.

Ultra's Insight: Big Solution with Built-In Best Practices

SAP S/4HANA is SAP's flagship product. It is built on a common database platform for all supported functionality in SAP's proprietary cloud environment. It has broad functionality that covers most industries and types of companies. However, it is typically geared for companies that are in the upper-mid-market or larger. It is also a product that is global in scope, with customers on all continents. For companies requiring less depth and breadth, SAP offers other solutions, like Business One and Business ByDesign.

Within the distribution marketplace, SAP's largest market share is in healthcare/ pharmaceuticals, where it supports the majority of the large distribution companies. They also have a strong presence in food service distribution, industrial product distribution and technology distribution. With its depth of functionality in complementary industries, SAP S/4HANA is a good option for companies that are moving into another complementary space, such as manufacturing, through either acquisition or expansion of capability.

SAP has built more than 250 best practices into S/4HANA as part of its flow and functionality. Looking into the future, SAP will add more functionality to support IOT and process automation. It also is incorporating machine learning, RPA and artificial intelligence to improve office automation and remove manual repetitive processes. SAP prides itself on being an end-to-end business process company that provides customers with one integrated solution.

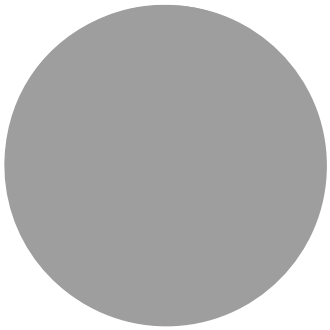
SAP has been focusing on distribution starting in the late 1990s. Since 2004, it has employed a global team of experts working with distribution customers to make sure the software and best practices it incorporates into its technologies meet the needs of this market. One example of where it excels for distribution is the ability to monitor and provide complex rebates and chargeback functionality, reflecting the continued complexity of marketing programs.

SAP's goal with their customers is to "Bend the Cost Curve." This means demonstrating that the use of SAP will allow a customer with stagnant revenue cost per employee to break out of with significant growth through automation of manual processes and providing better employee throughput of orders.

KEY ERP SOFTWARE CAPABILITIES: SAP S/4HANA

CATEGORY	FUNCTIONALITY	CLASSIFICATION	DEMONSTRATED INTEGRATIONS
Customer Management	CRM - Pipeline Management	Add-On	CRM to S/4
Customer Management	CRM - Marketing Management	Add-On	Marketing to CRM to S/4
Customer Management	Customer Quotes	Core	
Customer Management	Customer Case Management	Add-On	CRM to S/4
Customer Management	Automated Sales Order Processing	Core	
Customer Management	Pricing, Rebates and Promotions	Core	
Customer Management	Customer Returns	Core	
Customer Management	Omni Channel Support	Add-On	Commerce to S/4
Customer Management	Point of Sales Support	3-P	Multiple
Customer Management	Sales Tax Calculation and Reporting	3-P	Multiple
eCommerce	B2B Customer Portal	Add-On	Commerce to S/4
eCommerce	B2C Customer Website	Add-On	Commerce to S/4
Field Service	Field Service Mobile App	Add-On	Service to S/4
Field Service	Field Service Management	Add-On	Service to S/4
Field Service	Warranty Management	Core	
Supply Chain Management	Qualitative Forecasting	Add-On	Multiple
Supply Chain Management	Demand Planning	Add-On	Multiple
Supply Chain Management	Distribution Resource Planning (DRP)	Add-On	Multiple
Supply Chain Management	Product Costing Methodologies	Core	Multiple
Supply Chain Management	Global Supply Chain Visibility	Add-On	Multiple
Procurement	Alternative Product Sourcing	Core	Multiple
Procurement	Automated Payables	Core	Multiple
Procurement	Vendor Returns	Core	Multiple
Product Management	Product Lifecycle Management (PLM)	Add-On	Multiple
Product Management	Product Data Management (PDM)/Product Information Management (PIM)	Add-On	Multiple
Product Management	GS1 GDSN Data Synchronization	Add-On	Multiple
Product Management	Product Profitability	Core	Multiple
Quality Management	Serial and/or Lot Control Track-and-Trace	Core	Multiple
Quality Management	Quality Compliance	Core	Multiple
Quality Management	Non-Conformance Management	Add-On	Multiple
Transportation Management	Small Parcel Processing	3-P	Multiple
Transportation Management	Freight Bill Auditing	Core	Multiple
Transportation Management	Freight Asset Management	Core	Multiple
Transportation Management	Routing	Add-On	Multiple
Transportation Management	Dock scheduling	Add-On	Multiple
Transportation Management	Yard Management	Add-On	Multiple
Transportation Management	State Gas Tax Settlement	3-P	Multiple
Warehouse/Inventory Management	Device/Mobile Scanning & Equipment Supported	Core	Multiple
Warehouse/Inventory Management	Real-Time Labor/Order Reporting	Add-On	Multiple
Warehouse/Inventory Management	Robust Cycle Counting	Core	Multiple
Warehouse/Inventory Management	Cross-Docking	Add-On	Multiple
Warehouse/Inventory Management	Warehouse Optimization	Add-On	Multiple
Warehouse/Inventory Management	Integration with Conveyors/Robotics (Whse Execution System integration)	Add-On	Multiple
Warehouse/Inventory Management	ASN Receiving	Core	Multiple
Warehouse/Inventory Management	Directed Putaway and Replenishment	Core	Multiple
Warehouse/Inventory Management	Shelf Life Management	Core	Multiple
Warehouse/Inventory Management	Variable/Catch Weight Management	Core	Multiple
Warehouse/Inventory Management	Task Interleaving	Add-On	Multiple
Warehouse/Inventory Management	Voice Enabled Picking	Add-On	Multiple
Warehouse/Inventory Management	Put/Pick to Light	Add-On	Multiple
Warehouse/Inventory Management	Value Add Services	Add-On	Multiple
Warehouse/Inventory Management	Kitting and Assembly	Add-On	Multiple

Customers by Industry



Data not provided

Targeted Distribution Verticals

- Construction Materials
- Electronic Components
- Electrical
- Fasteners
- Food
- Lumber
- Maintenance Repair and Operations
- Safety

Distribution Customers

- Amazon
- AmerisourceBergen
- Grainger
- Lawson Products
- Lekkerland
- Saint-Gobain

SAP's Pitch

SAP software can help you achieve superior business performance while effectively managing your entire organization – people, inventory, business processes and technology, all while supporting digital collaboration inside and outside your enterprise. You can accomplish these objectives by adopting industry best practices supported by SAP solutions, which are based on the experience SAP has gained by working with thousands of wholesale distributors worldwide.

SAP software helps wholesale distributors reduce costs and increase revenues. Reducing costs comes in the form of more usable data, real-time insights and visibility into the entire business' value chain. Increasing revenues is executed through better customer engagement, customer feedback and enablement of new business models.

Deployment Options

Profile

SAP (sap.com) is headquartered in Walldorf, Germany, and was founded in 1972. The company had $32.2 billion in revenue in FY2020, and in July 2021 it had 440,000 customers, regional offices in 140 countries, 103,876 employees and 21,000 partners around the world. The company says that more than 75% of the world's transaction revenue touches an SAP system, and that approximately 80% of SAP customers are small and medium-sized enterprises.

FIVE MISTAKES THAT DERAIL ERP SOFTWARE SELECTION

The enterprise software selection process can be a long and complicated process – for several good reasons. The solution you choose will affect the way you conduct business for years to come. It will impact virtually every function. It's a significant investment. And with as much as half of ERP implementations failing to achieve their goals, it's critical to find a solution suited to your business and its unique needs.

But many organizations get off-track right at the start when they go into the selection process believing in some common myths about the process – misconceptions that can result in the wrong choice for your business.

Here are the five mistakes and misconceptions that will – inevitably – result in the selection of the wrong ERP solution:

1. Thinking that technology is the most important consideration.

Many companies replace their enterprise software because it's outdated or no longer supported by the vendor. While these are valid reasons to make the move to a new system, they shouldn't be the only ones. The software selection process is the perfect time to evaluate business goals and map them to your new solution. For example, you may want to reduce operating costs, increase productivity and streamline business processes. If you have these goals in mind, you're better able to narrow down your choices and request relevant demos from vendors.

2. Assuming that all ERP solutions are the same.

If you've ever bought a new car, you know that every model is different, even those built on the same platform. Each includes various features and benefits, including subtle differences in appearance. It's the same with ERP software. At first glance, it may seem like two solutions are exactly alike. But once you look under the hood, you may learn that one is more powerful. As you test drive it with a demo, you may find that one is more comfortable. The differences often may seem small, but looking critically at them is the key to finding software that fits your business.

3. Believing that a highly detailed RFP is required.

Many companies think they need to create lengthy RFPs, which often amount to hundreds of pages. But since most vendor offerings address core pain points, such as automating reports, these documents don't need to be nearly as long. Instead, you should look at the business problems you want to solve and processes you want to improve with the new software, not core functionalities that typically are the same across multiple vendors.

4. Thinking that an ERP project is an IT project.

While the IT department provides critical input, companies need to get various viewpoints from across the organization when they gather requirements in the software selection process. All too often, important stakeholders are left out of the conversation. Before looking at different systems, assemble a team with employees who work with and manage core processes, particularly those who use workstreams that span functions and departments. Whether it's accounting, sales, marketing, shop floor, warehouse, logistics, operations or any other department, it's important to know the challenges they have and what they need to do their jobs better.

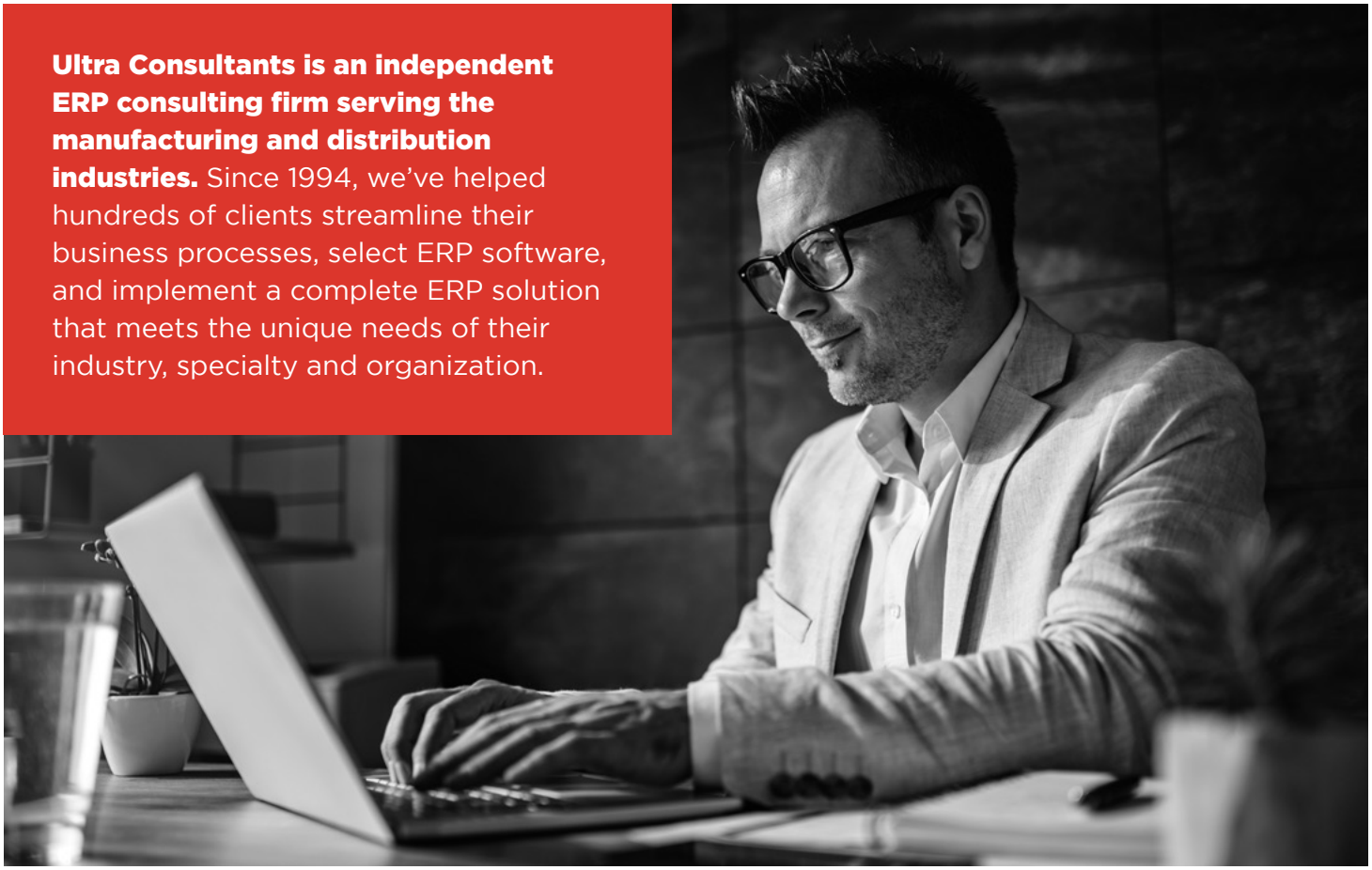
5. Assuming that big-name solutions are always the best solutions.

Corporate executives used to say, "No one ever got fired for buying IBM." And that mindset persists today.

Many organizations start their ERP selection with a list of the biggest and best-known companies in the ERP software marketplace. And the big-name vendors offer excellent choices for small, medium and large enterprises in a variety of deployment models. But their powerful products may not be right for your organization. Extensive customization may be necessary to meet the requirements of your segment and company. Or you may have to purchase specialized industry add-ons to get it to function the way you want. Instead, consider all the options available.

There are many ERP vendors that offer distribution-specific toolsets and broad industry expertise. But there is no one-size-fits-all solution. The functionalities and capabilities required are unique to each subvertical. And finding the best fit starts with evaluating software solutions and functions based on your organization's unique needs.

Ultra Consultants is an independent ERP consulting firm serving the manufacturing and distribution industries. Since 1994, we've helped hundreds of clients streamline their business processes, select ERP software, and implement a complete ERP solution that meets the unique needs of their industry, specialty and organization.



Why Ultra?

It's critically important to choose an ERP consulting partner with deep experience in your industry, expertise in your ERP solution, and experts who have worked in businesses like yours. And you will want to work with a firm that is independent, flexible and able to help you find the right solution for your organization.

For more than 27 years, Ultra Consultants has utilized its proven methodology, ERP knowledge and industry intelligence to deliver measurable business performance improvements to manufacturers and distributors in virtually every vertical.

- Our services are built for your industry. **We understand your processes and requirements.**
- Our solutions leverage our expertise. **We help you choose software to meet your unique needs.**
- Our results reflect our ERP experience. **We maximize benefits, minimize risk and deliver success.**

Regional Offices

Midwest
939 W. North Avenue
Suite 750
Chicago, IL 60642

West
1980 Festival Plaza Drive
Suite 300
Las Vegas, NV 89135

contact@ultraconsultants.com 312-319-1411 ultraconsultants.com

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