ERP Alternative to QuickBooks

Introduction

In a February 1, 2024, QuickBooks Blog article titled <u>QuickBooks Desktop to stop selling to new U.S. subscribers</u>, Intuit published its public announcement concerning its policy that it would no longer sell new subscriptions to several QuickBooks Desktop products after July 31, 2024. That date was later delayed to September 30, 2024.

Needless to say, this news shocked the tens of thousands, if not hundreds of thousands, of small businesses that maintain their bookkeeping records using QuickBooks Desktop.

While Intuit stated that **existing** subscribers could renew their subscriptions after July 31, 2024*****, many QuickBooks users were concerned by the ***** *(asterisk)* that annotates Intuit's Disclaimer about customer subscription renewals. **"Availability, terms, conditions, pricing, special features, and service support options subject to change without notice."**

Intuit also announced a May 31, 2025, Sunset date for their 2022 versions of QuickBooks Desktop. Then, on September 17, 2024, Intuit announced a new product, "Intuit Enterprise Suite," powered by QuickBooks and Mailchimp. This multi-entity version of what is essentially QuickBooks Online-Accountant was represented to be an all inclusive suite designed to meet the needs of mid-market users.

By March of 2024, **Insightful Accountant** had determined that QuickBooks users needed an independent review of various accounting alternatives suitable businesses currently using QB Desktop products.

On May 21 and 22, 2024, we compared a variety of Apps likely to meet the needs of QB Desktop Pro/Premier users. But those Apps were not likely to meet the requirements of QuickBooks Desktop Enterprise users.

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ERP Alternatives to QuickBooks

To provide a resource for QuickBooks Enterprise users, we had to identify the various features, functions, and capabilities offered by QuickBooks Desktop Enterprise. Since we determined that the focus should be on those unique capabilities of QuickBooks Enterprise that made it suitable for medium-small to truly mid-sized businesses, we knew that our comparison had to be focused on the Enterprise Resource Planning (ERP) offerings.

We wanted to provide meaningful solutions that fit a range of business sizes, and financial standing. We therefore determined that alternatives fitting into no less than three (3) tiers would be required. Subsequently we divided the upper tier into two tiers representing non-specialized and specialized ERPs.

Based on that, we then identified the apps that fit the definition of each of our tiers and selected those with the best 'reputation' in their categories.

We had to identify the features, functions and capabilities that were most common to all of our solutions as well as QuickBooks Enterprise. In many cases we had to 'standardize the nomenclature' in order to simply list features performing the same function but by different names in each of the ERP solutions for our feature set.

In the end, we examined more than eighty such features and functions and produced a spreadsheet by ERP solution indicating the solution either had (or didn't have) the feature, that the feature was optional, that the feature was only partially available (did less than we found in other products) or that a third-party add-in provided it.

While we produced that spreadsheet as a whole, and you will find it in this Blue Paper, we also split the spreadsheet into two parts for quicker reference and presentation purposes. One of our spreadsheets represents the Accounting/Finance/Management features. The other spreadsheet represents the Inventory/Manufacturing/Projects and Specialized features.

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At the same time, we examined the results of our analysis, which was conducted through product documentation review, product demonstrations, product trial testing, and personal knowledge of some of the products. We initially compared each of the ERP solutions against a set of nine (9) evaluation factors. These evaluation factors included:

❖ Ease Implementation
❖ Configurability/Customization
❖ Automation capabilities
❖ Mobility
❖ Ease of use
❖ Accuracy
❖ Product Support
❖ Price
❖ Reputation

These scores were adjusted from time to time as additional features were evaluated and documentary evidence arose.

Based on our analysis, we then began preparation of the Solution-by-Solution Blue Papers that provide a synopsis of each of the ERPs, key description factors, an evaluation summary, pros, cons, and the scored comparison factors (shown above), along with a composite score comparison to QuickBooks Desktop Enterprise.

We have also prepared numerous charts reflecting the dynamic positioning of each of the ERPs in our study, the comparison factors in tabular form, and their composite scores.

We have even prepared a stair-step analysis of the various apps by tier with their relative scores.

Let me stop and say a word about the environment of our ERP study. We examined ERPs that offer a 'cloud-based' solution in all cases. None of the ERPs in our study were tested in an 'on-premise' or 'hybrid' configuration.

ERP Alternatives to QuickBooks

A few of the ERPs in our study may offer an on-premise, hybrid, or customer-selected cloud hosting alternative to the developer's standard cloud-hosted solution. We have sometimes mentioned one or more of these alternatives in our product analyses.

Migrating from a simple accounting solution like QuickBooks, even if you use QuickBooks Desktop Enterprise or QuickBooks Online-Advanced, is different from switching from QBO-Premier to QBO-Plus. ERPs are customized to your exact requirements, mode of operation, and potential future needs. This customization usually involves adding modules or features you elect to include in your product subscription.

As a result, we will not even attempt to provide guidance on the actual migration from one product to another. Rather, we will discuss essential steps you and your organization should take in preparation for a potential migration.

We will discuss the importance of establishing a team to participate in your analysis of one or more potential ERPs that you feel most likely will meet your requirements. This team, representing a broad range of your staff, will be integral to your success when you begin implementation, training on the new product, and using the new ERP in lieu of QuickBooks. We will also discuss six additional steps for success.

One note of clarification: With the announcement of Intuit Enterprise Suite, we felt compelled to include it in our study; however, we were limited in our analysis because of a lack of available detailed information and the absence of a product trial. As a result, our analysis is limited to the product data Intuit made available.

Our ultimate objective with this Blue Paper (aka White Paper) is to equip you with the necessary information to make informed decisions about the most suitable ERP solution and ensure the success of your organization or your clients' migration to a new ERP.

This Blue Paper (aka *White Paper*) is the result of our review of ERP alternatives to QuickBooks.
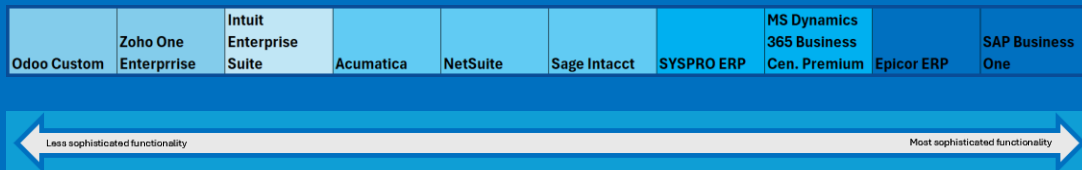
William "*Murph*" Murphy

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ERP Alternatives to QuickBooks

The "Be Insightful" ERP Alternatives to QuickBooks Enterprise and QBO Advanced.

- ➤ **Acumatica** [Acumatica]
- ➤ **Epicor ERP** [Epicor]
- ➤ **Intuit Enterprise Suite** [IES]
- ➤ **Microsoft Dynamics 365 Business Central-Premium** [MSD365BCP]
- ➤ **NetSuite by Oracle** [NetSuite]
- ➤ **Odoo (Custom)** [Odoo]
- ➤ **Sage Intacct** [Intacct]
- ➤ **SAP Business One** [SAPB1]
- ➤ **SYSPRO ERP** [Syspro]
- ➤ **Zoho One Enterprise** [Zoho1]

Please note that the name appearing in brackets (above) reflects the shortened version we may have used in various aspects of this Blue Paper.

While the list above is shown in alphabetical order, the graphic below shows that these apps represent a continuum of level and specificity.

Odoo Custom	Zoho One Enterprrise	Intuit Enterprise Suite	Acumatica	NetSuite	Sage Intacct	SYSPRO ERP	MS Dynamics 365 Business Cen. Premium	Epicor ERP	SAP Business One

Less sophisticated functionality ← → Most sophisticated functionality

Based on our analysis, the three ERPs on the left represent the 'less sophisticated' solutions from a functionality standpoint.

The three ERPs in the middle represent a mid-range of ERP solutions that provide the most functionality and potential growth capabilities but are designed for middle-small to mid-market organizations.

The four ERPs on the right represent ERPs with highly specialized functionality for the mid-market or highly customizable full-featured ERPs that tend to be used by mid-market to small-enterprise-level organizations.

While some of these ERPs may consider themselves 'enterprise-level' solutions, our analysis, including user reviews, indicates that they are better suited for many of the organizations currently being served by QuickBooks Enterprise or QuickBooks Online-Advanced, and which have found themselves needing an alternative.

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ERP Alternatives to QuickBooks

Why Consider an ERP Alternative for QuickBooks?

There are four reasons why users of QuickBooks Enterprise and even QuickBooks Online-Advanced should consider an ERP alternative.

1 -QuickBooks Product Elimination(s)

Who knows what Intuit intends to do with either of these products? Clearly, QuickBooks Desktop is quickly becoming "a thing of the past."
I estimate that QuickBooks Pro/Premier will be gone as soon as Intuit can sweep the debris from their demise off their doorstep. I see them gone by September 30, 2026.

I honestly believe that QuickBooks Desktop Enterprise will be "laid to rest" within two years after Pro/Premier, and it could be sooner. As soon as Intuit 'beefs' up Intuit Enterprise Suite with a little more inventory and warehouse functionality (probably pulled from the cloud-based functionality within Enterprise running within the internal browser), I suspect the only 'Enterprise' in the product line will be IES.

And why offer QuickBooks Online-Advanced as a separate product (SKU) when they simply roll users into Intuit Enterprise Suite? QBO-Advanced is the foundation of IES. I suspect that this could happen even before QuickBooks Desktop Enterprise is terminated.

So both sets of users, QB Desktop Enterprise and QBO Advanced, need to be ready for an alternative, even if that alternative is Intuit Enterprise Suite. However, many of these users will also find that they need a plug-in Inventory/Manufacturing, Project, or Construction app, even with IES.

Then, the only alternative becomes an ERP, and it is likely to be one of the ERPs in this study.

#2 -Organization Has Outgrown QuickBooks

The next reason to begin now looking at an ERP is when the client says, *"We've simply outgrown QuickBooks"* (Desktop Enterprise or QBO-Advanced).

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Why Consider an ERP Alternative for QuickBooks?

Four Reasons to Consider an ERP Alternative (cont.)

2 - Organization Has Outgrown QuickBooks (cont.)

When you believe ***"We've simply outgrown QuickBooks!"*** it might be because users are experiencing slow performance and overload errors or your IT staff is concerned about your file size.

Even QuickBooks Online-Advanced users who import a significant number of transactions from a Point-of-sale, eCommerce, or EDI connector are experiencing overload and performance issues during those imports.

Lately, QuickBooks has started slowing to a crawl; they try to create a new sales order for a client with thirty different assembly items, and it just seems that QuickBooks has to almost send an imaginary employee to the warehouse across the country to take a count of available parts from which the widgets are built.

Or they try to run an inventory valuation report for their on-hand stock, and QuickBooks compiles and prepares the report to print in 30 minutes. It gets even longer when users are in the system trying to process orders or acquire new raw materials.

This sounds like it's time to begin exploring an ERP in any of these cases.

3 - Organization Needs something more specific to their Business.

You typically hear your client say something like, "We need something more specific to our business and business processes; QuickBooks simply isn't 'cutting the mustard'." (I personally have never had to 'cut the mustard'; I usually can spread it on my bread or bun, but I guess if you let it sit out with the lid off, it gets so think you might have to cut it?)

I think you get my point; the longer something goes, the more difficult it is to deal with it. This is especially true for a fast-growing business.

When a company starts out, it is usually "on a shoestring." They learn to get by on what they have available. Their first accounting might have been Excel or maybe even a shoebox of receipts, invoices, and vendor bills.

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Why Consider an ERP Alternative for QuickBooks?

Four Reasons to Consider an ERP Alternative (cont.)

3 - Organization Needs something more specific to their Business (cont.).

Their next accounting solution was QuickBooks Desktop Pro, which handled their checking account, let them invoice their clients, and tracked their vendor bills and payments. It worked pretty well until they needed to start tracking the cost of building the 'widgets' they were manufacturing.

Then, they migrated from QuickBooks Desktop Pro to QuickBooks Desktop Premier. It was a little more expensive but worth it because it allowed them to 'create assemblies' to track their manufacturing efforts.

But before long, they were doing so much 'widget' business that they needed a second location, and that meant separate inventory, and separate manufacturing lines. They switched to QuickBooks Desktop Enterprise and added the 'Advanced Inventory' functionalities to deal with this. Now, they could even assign serial numbers to each of their widgets and use mobile devices to fulfill sales orders by picking, packing, and shipping their production orders.

Yet even with these added functionalities, they still need more production control. They've been told that if they want to keep QuickBooks but also want 'Shop Floor Control' with ready-on-time inventory from the warehouse to each work area, along with corresponding progress tracking, they must purchase an expensive QuickBooks plug-in third-party solution.

Now, they hear that QuickBooks Desktop might be discontinued. Even if that doesn't happen for three to five years, why consider an expensive third-party add-on to QuickBooks during the interim?

 The 'Widget Maker' is prepared to begin exploring a total solution rather than a plug-and-play manufacturing add-on to Desktop Enterprise. They are ready to find out which ERPs might be right for them. And get a quote so they know what to budget for their upcoming fiscal year.

ERP Alternatives to QuickBooks

Why Consider an ERP Alternative for QuickBooks?

Four Reasons to Consider an ERP Alternative (cont.)

 # 4 – The ROI of an ERP will more than pay for itself.

You or your clients have been listening to the morning financial shows on the radio and hearing the advertisements for 'Acumatica,' 'NetSuite,' or 'Odoo' and one of the two of you are convinced that "an ERP can save them sufficient personnel time reductions that the return-on-investment (ROI) will be more than enough to justify the cost to migrate to an ERP.

It's likely that either you or your client is right about the ROI of an ERP investment. Time and time again, we read comments from confirmed users of the various ERPs about how a particular feature saved so much time that they could reduce a position by at least half time or eliminate the need to hire an additional person as they had planned.

In other instances, business owners write reviews about their ability to identify 'parts walking off the job' or 'working going unbilled' because it wasn't tracked properly. In each of these instances, the ability to eliminate such activities or behaviors resulted in either a reduction in 'inventory losses' or an increase in 'revenues sufficient for the ERP to pay for itself.

If you suspect you or your client has issues of this nature occurring in their organizations, then it's probably time to consider an ERP. As part of the preliminary assessment phase of a potential implementation, any of the ERP Developers in our list for the second tier or higher of ERPS should be able to assist you with a Return-on-investment analysis that may confirm your belief that now is the time to 'save money' or 'boost revenues' with an ERP.

With this said, dive deeper into the ten ERPs that we studied.

ERP Alternatives to QuickBooks

Defining ERPs based on their Applications (uses)

We told you earlier that the ten ERPs in our study fell into four tiers representing a continuum from less sophisticated to most sophisticated. Now, we want to look at the various applications each of the ten ERPs tends to be used for.

The chart below is two charts in one. The upper portion looks at the common uses of each ERP, and the lower portion looks at the type of Manufacturing uses associated with ERPs that offer manufacturing capabilities. (Refer to the 'symbol key' at the bottom of the next page.)

ERP Applicatons	Acumatica	Epicor ERP	Intuit Enterprise Suite	MS Dynamics 365 Business Cen. Premium	NetSuite	Odoo Custom	Sage Intacct	SAP Business One	SYSPRO ERP	Zoho One Enterprrise
Accounting/Finance	X	X	X	X	X	X	X	X	X	X
Construction	X	V	L	L	X	X	X	L		X
Distribution/Wholesale	X	X	L	X	X	X	X	X	X	X
Field Services	X			X	X	X		L		O
Health Care		L		L	X	L	X			L
Hospitality				L	X	X	X			L
Manufacturing	X	X		X	X	X	L	X	X	L
Non-Profit			L	L	X	X	X			L
Professional Services	X	V	L	l	X	L	X		X	L
Retail/Ecommerce	X	V	L	3	X	X	X	X	X	X
Warehousing	X	X		X	X	X	X	X	X	X
Manufacturing Type										
Discrete	X	X		X	X	X	L	X	X	L
Process	X				L	L			L	X
MTO/ETO	X	X			L	L	L		L	X

Each of our ten ERPs provides accounting, finance, and general business management functionality.

Half of them provide Construction functionality, and all but one provide Distribution/Wholesale functionality to some extent.

While seven of the ten provide manufacturing capabilities of one type or another, two others offer limited manufacturing features.

Looking at the bottom of the chart, we can see that most of the ERPs offering manufacturing capabilities only handle 'Discrete' manufacturing. Two of the ten ERPs can provide complete 'Process' manufacturing, and only three of our ten ERPs can handle Made-to-order or Engineered-to-order functionality.

If you are looking for an ERP to manage and control Engineered-to-order manufacturing, your choices are limited. However, since four of the ERPs offer some features in this category, you should consider them.

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ERP Alternatives to QuickBooks

Finance, Accounting, and Management Features

As part of the study, we needed to evaluate our ten ERPs' various features and functional capabilities. We developed a list of more than eighty criteria. After initially preparing the list, we divided it into two parts: the first part was Finance, Accounting, and Management features. The second part was Inventory, Manufacturing, Project, and Specialized features.

Accounting/Finance/Management Features and Functions	Acumatica	Epicor ERP	Intuit Enterprise Suite	MS Dynamics 365 Business Cen. Premium	NetSuite by Oracle	Odoo Custom	Sage Intacct	SAP Business One	SYSPRO ERP	Zoho One Enterprise
Accounts Payable	X	X	X	X	X	X	X	X	X	X
Accounts Receivable	X	X	X	X	X	X	X	X	X	X
Appointments	X	V	X	X	X	X	O	X	X	A
Bank Feeds	X	X	X	X	X	X	X	X	X	X
Budgets (Multi-level)	X	X	X	X	X	X	X	X	X	X
Business Analytics/Metrics	X	X	X	X	X	X	X	X	X	X
Calendar Boards/Scheduling	X	V	X	X	X	X	X	X	O	A
Cash/Currency Management	X	X	X	X	X	X	X	X	X	X
Check issuance/printing	X	X	X	X	X	X		X	X	
Contracts and Renewals	X	X	X	X	X	X	X	X	X	A
Customer Portal	X	X				X	X			A
Customer Relations Management (CRM)	X	X	X	X	X	X	O	X	X	X
Dashboards	X	X	X	X	X	X	X	X	X	X
Document Management (Capture/Linkage)	X	X	X	X	X	X	X	X	X	X
Expense Management	X	X	X	X	X	X	X	X	X	X
Fixed Assets	X	X	X	X	X	X	X	X	X	A
Flexible Billing/Payment Options	X	X	X	X	X	X	X	X	X	
General Ledger (with Full Audit Trail)	X	X	X	X	X	X	X	X	X	X
Global Financial Compliance	X			X	X	X	X	X		X
Human Resource Management	X	X	O	X	X	X	X	X		X
Intercompany Transactions	X	X	X	X	X	X	X	O	O	X
Invoicing (Auto/Batch/Paymt-integration)	X	X	X	X	X	X	X	X	X	P
Link AP Bills	X	X	X	X	X	X	X	X		
Marketing/Campaign Management		X		X	X	X	X	X	O	A
Material Requirements Planning (MRP)	X	X		X	X	X	X	X	X	X
Mobile App/Solution	X		X			X		X	O	
Multi-currency with Gains/Losses Recognition	X	X	X	X	X	X	X	O	O	X
Multi-dimensionality Supported	X	X	X	X	X	X	X	X	O	X
Multi-entity Capability	X	X	X	X	X	X	X	O	O	X
Multi-language and Localization	X	V		X	X	X	X	X	X	X
Payments	X	X	X	X	X	X	X	X		X
Payroll	X	X	X	X	X	X	O	X		X
Prepaid Accruals	X	X		X	X	X	X	X	X	X
Purchase Order Management	X	X	X	X	X	X	X	X	X	X
Recurrring Revenue	X	X	X	X	X	X	X	X	X	X
Reporting	X	X	X	X	X	X	X	X	X	X
Reporting Consolidation	X	X	X	X	X	X	X	O	O	
Revenue Recognition	X	X	X	X	X	X	X	X	X	X
Roles, Permissions, Access Management	X	X	X	X	X	X	X	X	X	X
Sales Tax Automation	X	X	X	X	X	3P	X	X	X	X
Signature Capture on Documents	X	X	L	X	X	X	X	X	X	X
Tax Management	X	X	X	X	X	X	X	X	X	X
Time Management	X	X	X	X	X	X	X	X	L	X
Vendor Bill Management w OCR	X	X	X	X	X	X	X	X	X	X
Vendor Payments (Print/Wire/ACH)	X	X	X	X	X	X	X	X	X	A
Workflows (Configurable)	X	X	X	X	X	L	X	O	X	X

Symbol Key:

X = Feature included in our review, **'blank'** = Feature not tested or available.
A = Available app or add-on, **L** = Limited functionality, **O** = Optional feature,
3P = Feature available via a 3rd-party plug-in/add-on.

ERP Alternatives to QuickBooks

Inventory, Manufacturing, Project, and Specialized Features

The chart below reflects the Inventory, Manufacturing, Project, and Specialized features of our ten ERPs.

Accounting/Finance/Management Features and Functions	Acumatica	Epicor ERP	Intuit Enterprise Suite	MS Dynamics 365 Business Cen. Premium	NetSuite by Oracle	Odoo Custom	Sage Intacct	SAP Business One	SYSPRO ERP	Zoho One Enterprise
Accounts Payable	X	X	X	X	X	X	X	X	X	X
Accounts Receivable	X	X	X	X	X	X	X	X	X	X
Appointments	X	V	X	X	X	X	O	X	X	A
Bank Feeds	X	X	X	X	X	X	X	X	X	X
Budgets (Multi-level)	X	X	X	X	X	X	X	X	X	X
Business Analytics/Metrics	X	X	X	X	X	X	X	X	X	X
Calendar Boards/Scheduling	X	V	X	X	X	X	X	X	O	A
Cash/Currency Management	X	X	X	X	X	X	X	X	X	X
Check issuance/printing	X	X	X	X	X	X		X	X	X
Contracts and Renewals	X	X	X	X	X	X	X	X	X	A
Customer Portal	X	X				X	X			A
Customer Relations Management (CRM)	X	X	X	X	X	X	O	X	X	X
Dashboards	X	X	X	X	X	X	X	X	X	X
Document Management (Capture/Linkage)	X	X	X	X	X	X	X	X	X	X
Expense Management	X	X	X	X	X	X	X	X	X	X
Fixed Assets	X	X	X	X	X	X	X	X	X	A
Flexible Billing/Payment Options	X	X	X	X	X	X	X	X	X	
General Ledger (with Full Audit Trail)	X	X	X	X	X	X	X	X		X
Global Financial Compliance	X			X	X	X	X	X		X
Human Resource Management	X	X	O	X	X	X	X	X		X
Intercompany Transactions	X	X	X	X	X	X	X	O	O	X
Invoicing (Auto/Batch/Paymt-integration)	X	X	X	X	X	X	X	X	X	P
Link AP Bills	X	X	X	X	X	X	X	X	X	X
Marketing/Campaign Management		X		X	X	X	X	X	O	A
Material Requirements Planning (MRP)	X	X		X	X	X	O	X	X	X
Mobile App/Solution	X		X			X		X	O	X
Multi-currency with Gains/Losses Recognition	X	X	X	X	X	X	X	O	O	X
Multi-dimensionality Supported	X	X	X	X	X	X	X	X	O	X
Multi-entity Capability	X	X	X	X	X	X	X	O	O	X
Multi-language and Localization	X	V		X	X	X	X	O	X	X
Payments	X	X	X	X	X	X	X	X	X	X
Payroll	X	X	X	X	X	X	O	X		X
Prepaid Accruals	X	X		X	X	X	X	X	X	X
Purchase Order Management	X	X	X	X	X	X	X	X	X	X
Recurrring Revenue	X	X	X	X	X	X	X	X	X	X
Reporting	X	X	X	X	X	X	X	X	X	X
Reporting Consolidation	X	X	X	X	X	X	X	O	O	
Revenue Recognition	X	X	X	X	X	X	X	X		X
Roles, Permissions, Access Management	X	X	X	X	X	X	X	X	X	X
Sales Tax Automation	X	X	X	X	X	3P	X	X	X	X
Signature Capture on Documents	X	X	L	X	X	X	X	X	X	X
Tax Management	X	X	X	X	X	X	X	X	X	X
Time Management	X	X	X	X	X	X	X	X	L	X
Vendor Bill Management w OCR	X	X	X	X	X	X	X	X	X	X
Vendor Payments (Print/Wire/ACH)	X	X	X	X	X	X	X	X	X	A
Workflows (Configurable)	X	X	X	X	X	L	X	O	X	X

X = Feature included in our review, 'blank' = Feature not tested or available.
A = Available app or add-on, L = Limited functionality, O = Optional feature,
3P = Feature available via a 3rd-party plug-in/add-on.

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ACUMATICA

PROFILE

Acumatica is a comprehensive cloud-based solution that handles your accounting and manages your business-specific operational requirements.

Acumatica can manage most aspects of your business without needing add-ons or plug-ins to accomplish required tasks.

Description

- ➤ *Especially well suited for Construction, Manufacturing, Distribution and Retail/eCommerce, or combinations thereof.*
- ➤ *Business-specific Editions are built around 'Core' Financials and General Business functions (GL, AP, AR, CRN, etc.)*

Comparison

[**QuickBooks Desktop Enterprise**]

> 4.0

[**Acumatica**]

> 4.3

Acumatica

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▶ Evaluation

Acumatica is a cloud-based enterprise resource planner (ERP) shaped by the input of their 26,000+ customers.

- • Modern ERP offering future-ready solutions built on innovative cutting-edge technology.
- • Using Artificial Intelligence to enhance the human quality of the software, making it seem like a "member of the team."

▶ Pros

- • Simple, clean, and modern User Interface makes it easy to use.
- • Increasing Artificial Intelligence is streamlining many tasks and reducing mundane and repetitive tasks.
- • Non-user-based pricing provides an 'easier to get into' solution well suited for growing companies.
- • Well suited for Manufacturing/Wholesale/Distribution.

▶ Cons

- • Some features may be too complex for some personnel, like manufacturing and warehouse workers.
- • Analytics may not be as strong as other ERPs

▶ Comparison Factors *(1 to 10)*

- • Easy of Implementation = 8.4
- • Configurability/Customization = 8.8
- • Automation capabilities = 8.8
- • Mobility = 8.4
- • Ease of use = 8.8
- • Accuracy = 8.8
- • Product Support = 8.7
- • Price = 7.5
- • Reputation = 9.1

I.A. Analyst's Evaluation

Acumatica ERP lets you manage your business, review customer interactions, and evaluate business insights anytime, anywhere, on any device. Easily manage your operations, whether in the office or on the go, with functionality built for today's hybrid work environment.

From a financial management perspective, Acumatica can easily handle your income, expenses, costs of operation, assets, and liabilities, regardless of the size or scope of your business. Whether you are a retailer, manufacturer, distributor, contractor, or service-industry business, Acumatica provides the real-time financials you need to help your business thrive.

Acumatica lets you focus on the customers who drive your business. Their CRM functionality allows you to manage leads, maintain customer interactions, promote and close opportunities, and effectively follow up on sales. Their incorporated customer portals simplify customer access to their records, including invoices due, so they can make payments that get you your money faster.

Acumatica's project management features let you build budgets, track project time and costs, and invoice on a project-completion basis. With their project reporting, you will always know where you stand, comparing estimated expenses and revenues against revisions, final costs, and income upon project completion.

Multi-company, not a problem. Acumatica simplifies accounting for multiple entities with intercompany transactions designed to prevent inaccuracies in financial reporting for one, a combination of, or all your related companies.

Acumatica allows retailers to manage multiple channels, including eCommerce shopping carts and marketplace integration. It can also handle in-store experiences via plug-in Point-of-sale that works seamlessly with every aspect of your Acumatica configuration, including inventory, warehousing, and order fulfillment.

Manufacturing is Acumatica's forte.' You will have complete control over core manufacturing capabilities ranging from materials resource planning to engineering product design, advanced planning and scheduling to product configuration, and production management with endless levels of bill of materials and production routing.

Acumatica's distribution features allow you to implement a solution designed to meet your needs, whether you distribute from a single location or a thousand locations worldwide. Order management, inventory management, requisition, purchasing, and receiving management are just some of what simplifies a distributor's work with Acumatica. Their warehouse management system will streamline all warehouse operations to automate processes and enhance productivity.

If construction is your thing, then Acumatica's ERP can manage your business. Whether you are a general contractor, trades sub-contractor, land developer, or home builder, Acumatica has you covered.

to manage customer service requests, scheduling, and job assignments based on crew, equipment, location, and availability. You will efficiently track all costs, time, performance, and revenues that can significantly improve your bottom line.

No matter what your business is, Acumatica will provide better insights into your company to improve your business decision-making with reporting, dashboards customized to your requirements, and data analysis and metrics designed for your company.

Insightful Accountant®

EPICOR

PROFILE

Epicor is an all-in-one ERP designed to meet each customer's specific needs. It tends to focus on mid-market businesses with very specialized requirements.

Their more than 50 years of experience has given them close relationships in market segments to build what their customers want in an ERP.

Description

➢ *Focuses on inventory-centric businesses like distributors, manufacturers, wholesalers, and some retailers.*

➢ *Long-standing, stable company with a sound product.*

➢ *Typically used by businesses with more than 200 employees.*

Comparison

[**QuickBooks Desktop Enterprise**]

4.0

[**Epicor ERP**]

4.0

Epicor

807 Las Cimas Pkwy #400

Austin, TX 78746 USA

Phone: 512-328-2300

info@epicor.com

▶ Evaluation

Epicor builds industry-specific ERPs that meet the needs of inventory-intensive suppliers and manufacturers.

- Not competing for 'generic' businesses, focuses on 'major names' within mid-market specialized product distributors.

- Tends to be at a higher price point than many other ERPs within this study.

▶ Pros

- Interface is user-friendly but somewhat outdated.

- Features and functionality abound, and Epicor excels in functions that users typically need every day.

- Improving business analytics and intelligence is enhancing functionality and information delivery.

- Set-up specialization and customization are not unusual.

▶ Cons

- Extensive set-up time and implementation costs.

- Documentation is generic and lacks customization information.

▶ Comparison Factors *(1 to 10)*

- Easy of Implementation = 7.8

- Configurability/Customization = 9.2

- Automation capabilities = 8.0

- Mobility = 7.8

- Ease of use = 8.1

- Accuracy = 8.4

- Product Support = 8.4

- Price = 6.3

- Reputation = 8.8

I.A. Analyst's Evaluation

Epicor® isn't an all-in-one ERP; it's designed and configured specifically for distributors, manufacturers, retailers, and other inventory-centric businesses. Epicor has honed its expertise to understand these industry verticals' unique processes and requirements, which is a testament to its suitability for your business.

Epicor has been developing purpose-built ERPs for over fifty years, partnering with customers to ensure they meet each customer type's current and future needs. It's a robust ERP designed to empower users, putting them in control and building efficiencies that help boost the profitability of any manufacturing, wholesale, distributing, or retail business.

It's much more than a 'buy it, receive it, sell it, pick it, pack it, and ship it' accounting system. Epicor offers various purpose-built ERPs designed to meet the unique needs of manufacturing, wholesale, distributing, and retail businesses. Leading global companies trust Epicor, using their ERPs to run their businesses. This trust testifies to Epicor's credibility, which should give you confidence in its reliability.

Epicor simplifies the complex processes in these businesses' environments. It is designed around processes that users require every day; therefore, it excels in functionalities like front counter, CRM, estimating and quotation, contract pricing, sales, job scheduling, production/manufacturing, inventory management and control, materials resource planning, progress or recurring invoicing, and more.

Epicor ERPs are designed to be user-friendly because they understand that an ERP should work the way the user does. So, their interface is simple to use for the most part, but it's less modern than many other ERPs in this study; it could use either a facelift or at least some Botox. It reminds me of the on-board display in my Ford Pickup; pick this to see these three buttons and pick one of them to see three more. I prefer workflow diagrams that many users reading this study will be used to, especially those considering migration from QuickBooks Desktop Enterprise.

Even though Epicor uses a single database, allowing a query to span multiple companies, its COA can accommodate multiple companies, divisions, departments, fiscal periods, and currencies.

Epicor ERP's modular design allows users to acquire the functions and features they need without paying for many features they will never use. One of its designated implementation teams can configure Epicor to meet the needs of almost any organization with high-volume inventory requirements, such as auto parts, lumber, metal fabrication, machinery and equipment distributors, and even complex assembly businesses.

Epicor's robust CRM module can act as the sales hub of your ERP. You can track all client and prospect communications, generate sales campaigns, and manage aspects of social media to improve customer lead generation. You can also create quotations (estimates) and convert them into orders.

Epicor ERP includes a full range of financial reports at various levels of detail. The ability to apply almost any filter criteria, similar to QuickBooks Desktop, means you can generate nearly any reports you need.

Epicor ERP offers a starting price in line with other ERPs in this comparison, providing a competitive entry point. With a range of modules and configurations, the final ERP you acquire tailored to your specific needs will likely exceed the base price you started with. While its complexity may require a more extended implementation and a higher cost, this adaptability ensures you get the most out of your investment.

PROFILE

Intuit Enterprise Suite (IES) is well-suited for complex single- and multi-entity businesses.

It features intercompany transactions and journal entries, consolidated multi-entity financial statements, and multi-dimensional reporting tailor-made for multi-entity companies.

Description

➢ *Accounting, payroll, payments, bill pay, and marketing are integrated into a single product.*

➢ *Supports multiple entities from a single log-on user interface. Role-based controls limit entity access and functionality.*

➢ *QBO-Advanced seems to be the core of the product.*

Comparison

[QuickBooks Desktop Enterprise]

4.0

[Intuit Enterprise Suite]

0

Intuit Enterprise Suite

Intuit

Mountain View, CA USA

Phone: 855-626-2712

www.intuit.com/enterprise/

▶ Evaluation

IES seeks to meet the needs of QuickBooks users who need multi-entity and enhanced functionality.

- Starting with 'Construction', IES will ultimately offer industry-specific versions with enhanced features for each.
- Intuit says IES is marketed at mid-market companies with over $ 3 million in annual revenues.

▶ Pros

- For QuickBooks migrators, the product looks and behaves almost identically to QBO-Advanced; thus, almost no learning curve is required.
- Uses the same familiar functions like Payroll, Payments, and Bill Pay, so again, there is no learning curve.
- Intuit says existing QBO (product-line) users can "switch" at the flip of a switch; no migration like Desktop to QBO.

▶ Cons

- Lack of pricing 'visibility' makes it difficult to recommend.
- Appears sole-support comes from Intuit Personnel Only.

▶ Comparison Factors *(1 to 10)*

- Easy of Implementation = 0.0
- Configurability/Customization = 0.0
- Automation capabilities = 0.0
- Mobility = 0.0
- Ease of use = 0.0
- Accuracy = 0.0
- Product Support = 0.0
- Price = 0.0
- Reputation = 0

Note: Without access to a working live Demo we were unable to evaluate the product using these factors.

I.A. Analyst's Evaluation*

Who can say if Intuit Enterprise Suite (IES) is truly an ERP? For now, *Insightful Accountant* is including it in this study. Intuit says IES is a comprehensive financial management solution uniquely designed to boost mid-market business profitability. Its core features include finance and accounting, payroll, payments, bill pay, and automated marketing, all aimed at meeting the needs of QuickBooks customers seeking enhanced functionality without sacrificing the intuitive nature of Intuit's products.

IES was designed for businesses that operate multiple US-based entities, generate over $3 million in annual revenue, need multidimensional reporting, and make numerous monthly inter-company transactions. IES offers industry-specific customizations for construction, non-profit, service, and project-based businesses. While construction-related features (like contractor-specific metrics, KPIs, and "change orders") are currently the only industry-specific functions available, more customizations are in the pipeline to cater to a broader range of companies. "Professional Services" will apparently be the next industry option for IES.

IES is designed to reduce manual, repetitive tasks with streamlined processes, enhancing productivity through automation. It facilitates faster decisions with real-time data and visibility across multi-entity portfolios, ensuring users can run their businesses more efficiently.

IES takes role-based access to a new level with predefined roles, fixed permissions, and features, including new project manager and bookkeeper roles. Roles and permissions can also be managed across multiple entities and created with specific permissions and transaction types.

With its advanced project management features, IES lets users manage project profitability. These include labor costs, project workflows, project-related tasks, change order processing, and task management. IES uses the power of AI to identify off-target projects and suggest actions to bring those projects back on track.

IES also provides AI-generated forecasts that predict two years into the future based on five past years of data. This feature ensures accurate and reliable financial planning. It also enhances the financial planning collaboration process with task lists and approval workflow for better alignment across departments.

Multidimensional reporting in IES provides an efficient method for setting up and partitioning data using 5 to 20 custom dimensions. The dimensions include departments, locations, business units, customer/vendor/employee segments, revenue categories, and product types.

We know IES is available in a base package offering single or multi-user access for up to 5 users, but we've not been told how many users it can accommodate. Since QBO-Advanced, which seems to be the foundation of IES, includes up to 25 users (at no additional cost), I think it's fair to assume that IES will at least have the same capability (but may charge for additional users, perhaps in blocks of 5. We also understand that 1 'Super User' is included and will control all entities incorporated into IES.

Speaking of multi-entity capabilities, the base package also includes up to 5 entities, and I've heard that IES can accommodate as many as 200 entities. Still, I have no official confirmation of that.

Pricing seems to have no 'public visibility' at all; we are simply told that there are too many variables involving the number of users, companies, dimensions, employees, and add-on options. But we've heard that some Intuit Reps have quoted more than $2500 per month.

*-based on preliminary information made available by Intuit.

PROFILE

Microsoft Dynamics 365 Business Central is a single-platform cloud ERP leveraging the latest business intelligence, data management, and automation technologies.

It provides financial and operational capabilities to businesses to enhance customer interactions, increase operational efficiency, drive growth, and improve profitability.

Description

➢ *Hosted in the Microsoft Azure Cloud.*

➢ *Integrates with other Microsoft products.*

➢ *Three versions available: Business Central Essentials, Business Central Premium, and Dynamics FC&SCM.*

Comparison

[**QuickBooks Desktop Enterprise**]

4.0

[**Microsoft Dynamics 365**]

4.2

Microsoft Dynamics 365 Business Central

One Microsoft Way

Redmond, WA 98052-6399

Phone: 855-270-0615

www.microsoft.com/en-us/dynamics-365/

Evaluation

Microsoft Dynamics 365 Business Central is an ERP that integrates seamlessly with other Microsoft products because it uses a standard data model.

- It combines functionality for finance, accounting, sales, customer support (CRM), project management, inventory, supply-chain management, and warehouse management.

Pros

- Similarity of interface with other Microsoft products like Word and Outlook makes it easy for users to adopt.

- Integration with other Microsoft 365 applications means users already know many of the incorporated tools.

- For sales and marketing functions, this seems like more of a CRM with attached accounting than a true ERP.

- Product pricing may be better than others in this study.

Cons

- Implementation costs can be higher, and take longer than others in this study.

- Not recommended for SMB Manufacturers, lacks MRP.

Comparison Factors *(1 to 10)*

- Easy of Implementation = 7.5

- Configurability/Customization = 8.9

- Automation capabilities = 8.4

- Mobility = 8.1

- Ease of use = 8.8

- Accuracy = 8.3

- Product Support = 8.8

- Price = 7.5

- Reputation = 9.8

I.A. Analyst's Evaluation

Microsoft Dynamics 365 is a scalable, cloud-based ERP solution hosted on the Microsoft Azure cloud. It leverages the latest automation, data management, and business intelligence innovations. Business Central consists of intelligent business applications that deliver superior operational efficiency and breakthrough customer experiences, enabling businesses to become more agile and reduce complexity without increasing costs. It's designed for medium-small to mid-sized companies.

Business Central is available in two versions: Essentials and Premium. Essentials includes Accounting, CRM, Project Management, Inventory, Supply Chain Management, and Warehouse management. These modular, prebuilt applications provide the functionality and tools to enhance and extend your business. Because pipeline, the modular tools and functional applications are native, your team will realize easier and faster adoption, which means faster enhancements in business productivity.

Business Central aims to improve company revenues by connecting every aspect of the business. By optimizing your operations, innovating team processes, and engaging more effectively with your customers, you will accelerate your business growth with Business Central. In many ways, Business Central seems like a CRM with attached accounting instead of an accounting system with an embedded CRM. A key feature of Business Central centers around connecting your sales and marketing features to lead customers faster down the pipeline, so you close more deals quicker. Other CRM functionality within Business Central is customer service features geared toward positive customer outcomes while providing increased visibility into your customers' needs.

Even though Microsoft promotes Business Central Essentials for small to midsize organizations, it's intended for middle-small to medium or even middle-large companies. It commonly supports 100 to 500 users and one thousand or more daily transactions. Yet, in our assessment, it is priced lower than many other ERPs but has a higher implementation cost.

Regarding reliability, MSD365 is the only business platform that works natively in the Microsoft Cloud alongside Microsoft 365, Azure, and Microsoft Power Platform. This means you will have unparalleled access to these Microsoft systems and processes.

If you need Manufacturing and Service management, then the Premium level of Business Central is the minimum you should consider; however, even Premium won't be suitable for your business if you need MRP, shop floor control, sophisticated assemblies or batches, and specialized manufacturing requirements. You might be able to plug in a 3rd party add-on for those specialized functions, but that somewhat negates why you probably went with an ERP in the first place.

Microsoft offers another level of Dynamics 365 called FC&SCM. It's much more than Business Central and is geared, designed, and engineered around your specific business organization. It focuses on larger enterprises with over 250 users and an average of 10-thousand-plus daily transactions. With an average implementation cost of over $500k and an average of 9 to 12 months implementation time, this is a solution we only mention here as a very high-end alternative; if you're convinced Microsoft is where you have to be, but Business Central Premium can't accommodate your requirements.

Microsoft Dynamics 365 Business Central may work for some businesses looking to migrate from QuickBooks. Still, it may be more than they require, even though it may not meet every requirement.

PROFILE

NetSuite is a fully-featured solution that provides a variety of industry-specific options along with core functionality.

It encompasses financial management, supply chain management, distribution, CRM, HR and payroll, and much more. Workflows and AI technology are enhancing NetSuite functionality.

Description

➤ *First Cloud Accounting System*

➤ *Runs on the Oracle Cloud Infrastructure Platform for maximum security, capability, performance and reliability.*

➤ *Delivers information and insights most businesses need.*

Comparison

[**QuickBooks Desktop Enterprise**]

4.0

[Netsuite]

4.3

Oracle NetSuite

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Austin, TX 78741

Phone: 877-638-7848

Infonetsuite_WW@oracle.com

Evaluation

NetSuite is a cloud-based enterprise resource planning (ERP) suite that gives businesses everything they need to run efficiently and scale in profitability.

- Integrated suite includes accounting, sales, customer service, supply chain, warehouse operations, HR, reporting/analytics and more.

- Automates processes, ensures proper controls.

Pros

- Single-source of truth because all functions are based on a single-data model.

- Embedded AI functions assist with tasks, suggest actions, generate insights, and analyze data faster.

- Oracle Cloud Infrastructure foundation is best-in-class.

- Continuous major enhancements coupled with product learning enhances user transition and experience.

Cons

- Competitive pricing remains at the top-end of the ERPs in this comparison.

- Implementation can be complex and lengthy.

Comparison Factors *(1 to 10)*

- Easy of Implementation = 8.0

- Configurability/Customization = 8.7

- Automation capabilities = 8.6

- Mobility = 8.4

- Ease of use = 8.4

- Accuracy = 8.8

- Product Support = 8.4

- Price = 7.5

- Reputation = 9.8

I.A. Analyst's Evaluation

NetSuite combines financial and operational data for a comprehensive, real-time view of your company's performance. AI technologies can then use this data from the suite to simplify business tasks and uncover insights that drive better decision-making.

NetSuite delivers a unique set of processes, activities, and functionality specially designed to help organizations grow, scale, and adapt to change. It includes hundreds of preconfigured 'best practices' workflows based on thousands of customer implementations; however, it's easy for business users to configure their own workflow templates to suit their unique business needs.

NetSuite lets you manage your entire and growing business with a single system. You can extend and optimize their core functionality by leveraging additional NetSuite features that fully integrate with the rest of your suite, allowing you to expand and improve your operations through each 'suiteness' enhancement.

NetSuite's general ledger supports your business's unique structure and requirements, using a simplified chart of accounts structure to organize your financial and statistical data. Many transaction types can be created automatically and are reported in real-time. You can easily create and update budgets across your entire organization. Your bank and credit card statements can be automatically imported into NetSuite for AI-powered reconciliation. NetSuite's period close checklist makes closing your books faster and easier than ever.

NetSuite streamlines your procurement process to provide enhanced visibility, efficiency, and effective purchasing controls. It features auto-matching of product receipts against issued purchase orders to avoid purchasing errors.

NetSuite traditionally uses item records for all sellable purchases (stock and non-stock products) to provide enhanced transaction efficiency, pricing conformity, and product tracking. Stock items are typically tracked using inventory items to maintain proper financial accountability of inventory assets.

Since NetSuite connects all your records and processes, your sales will be streamlined from lead information to quote/estimate to sales order, fulfillment, and invoice. You will gain complete visibility of sales without duplicating documentation.

By unifying your front and back offices, NetSuite delivers a complete view of your business in real-time, combining data with visual analytics to generate meaningful and actionable insights.

Insightful Accountant®

ODOO

PROFILE

Odoo is a self-assembled ERP. Begin with their accounting app, then add all the apps you need (CRM, Sales, Purchasing, Inventory, Manufacturing, and even POS and eCommerce) for your base monthly price per user.

Well suited for retail, hospitality, field-service, distribution, and light manufacturing.

Description

➢ *Start with their 'Custom' subscription, then add all the Apps you need.*

➢ *Support multi-company with Custom at no additional cost.*

➢ *Priced lower than most other solutions in this analysis.*

➢ *Simple to use*

Comparison

[**QuickBooks Desktop Enterprise**]

| 4.0 |

[**Odoo**

| 4.3 |

Odoo (USA)

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Brisbane, CA 94005

Phone: 650-691-3277

linfo@odoo.com

Evaluation

Odoo comes in two versions, Basic and Custom, Custom supports multi-user and includes all the Odoo Apps at no additional cost.

• Offers a suite of fully connectable business apps.

• Well suited for 10 to 20 users or less.

Pros

• Simple but powerful, good for businesses just outgrowing their existing financial software.

• Supports even complex functions like Retail Point-of-sale, Hospitality Point-of-sale, eCommerce, Rental businesses,

• Suitable for Manufacturing operations requiring materials traceability from suppliers to customer.

Cons

• Not well suited for entities with more than 200 employees.

• Support is a weakness, relies on chat, video conference, documentation and tutorials.

Comparison Factors *(1 to 10)*

• Easy of Implementation = 9.0

• Configurability/Customization = 9.0

• Automation capabilities = 8.7

• Mobility = 7.7

• Ease of use = 9.1

• Accuracy = 8.8

• Product Support = 7.1

• Price = 8.8

• Reputation = 8.8

I.A. Analyst's Evaluation

This evaluation takes a somewhat different approach than that of other ERPs in this study because it concerns one of two ERPs that are 'build yourself' rather than preconfigured or configured by the ERP developer for you.

We will begin with Odoo's 'Custom' subscription level, assuming we require 'multi-company' functionality. Then, we will select '**Accounting**' as our initial App, which consists of core financial functions like checking with bank synchronization. Now, we will add the **Invoicing** App that simplifies your billing process, including products, pricing, and tax tracking. An online payment option features a portal where customers can pay using several payment methods. It even supports multi-currency. We will also incorporate Odoo's **Expense** App to capture expenses on your phone or mobile device and upload receipts directly to your accounting department.

Let's continue to expand our Odoo ERP by adding some apps that are not explicitly related to finance. First, we will add their **Inventory** App, designed to provide real-time insight into your products so you never run short. Warehouse management is a feature of this App and includes inbound, stocking, and outgoing (pick/pack/ship) functionality. If you will be stocking products, you need ways to control your purchases. The Odoo **Purchasing** App provides rule-based RFQ and purchase order automation to assist with replenishment, from the right down to details like packaging, units of measure, variants, and more.

You'll want both the **Manufacturing** and **Product Lifecycle Management** Apps if you manufacture. Combined, you have the power of an MRP, MES, PLM, Quality control, Shop Floor management, and Maintenance. Manufacturing, Work, Repair, and Unbillable Orders are all available in this App, along with Multi-level Bills of Material, Work Centers, Routing, Versioning, Change-on-the-fly, Engineering controls, Production-maintenance, Granular inspections, and Quality alerts. You can hardly believe how powerful yet simple this App can be.

What good is all this purchasing, inventory, warehouse, and order fulfillment if you don't have sales and customer management? So, add Odoo's **CRM** and **Sales Apps** to your ERP. Their CRM focuses on your customers and future customers by tracking leads to opportunities for sales with all your customer communications in one place. And one of those communications will be the quotes you build within the Sales App. You can even let customers help themselves with online access to their quotes and more. For ventures requiring specialized revenue recognition, Odoo even has an app for subscription-based transactions.

However, not all sales are via email, phone, or text. Some businesses are still built around a retail establishment. You might sell widgets over the counter or expresso shots via the drive-in window. You might even need a kiosk or sales platform that lets your customers shop for themselves. Odoo covers you with **POS** (point-of-sale) app options, **eCommerc**e, and other configurations like '**Rental**' equipment. If you dispatch personnel to perform the work, the Odoo **Field Service** App interlinks with all the different apps, from customers to inventory, time and expense tracking, and Invoice.

But I'm not done yet; there is at least one other area that almost every one of these businesses will require... 'personnel.' So Odoo offers **Employees**, **Time Tracking**, **Payroll**, and **Benefits**.

Odoo can be basic accounting for single or multiple companies or an all-in-one ERP with various App options you select as part of your subscription price. You decide what you want and need, so you're not stuck with features you do not need that increase your cost above your pocketbook. I do wish they had better 'service options.'

Insightful Accountant®

SAGE Intacct

PROFILE

SAGE Intacct is not just a financial accounting system; it also offers ERP functionality. This is the only product in our study that has been endorsed by the AICPA for the product's GAAP compliance.

The product is well suited for growing businesses with a need for a 'lightweight' ERP.

Description

➢ *Highly suitable for mid-sized professional services, retail, and nonprofit entities.*

➢ *A knowledgeable accounting professional should supervise the use of this product.*

➢ *Well suited for businesses with $3 million in revenues or higher.*

Comparison

[QuickBooks Desktop Enterprise]
4.0

[SAP Business One]
4.2

Sage Intacct (Inc.)

300 Park Avenue

San Jose, CA, 95110 USA

Phone: (877) 704-3700

Email: intacct@sage.com

Evaluation

Sage Intacct is a comprehensive solution for service and general business types.

• Based on its HIPPA compliance, it can also be used by healthcare providers and smaller hospitals.

• Since pricing is driven by the feature set the user selects along with the number of employees using the system, there is significant variance in price.

Pros

• Scalability of the number of users and single-entity to multiple entities as the business grows.

• Interface is configurable to the specific requirements of each user.

• Great for financial reporting compliance but may require an accounting professional to supervise more sophisticated activities.

Cons

• Modularity means that you pay for only what you need, not necessarily what you want, and too many add-ons that should be part of the core offering.

• Non-financial functionality not as capable as other ERPs.

Comparison Factors *(1 to 10)*

• Easy of Implementation = 8.1

• Configurability/Customization = 8.6

• Automation capabilities = 8.5

• Mobility = 8.0

• Ease of use = 8.4

• Accuracy = 9.6

• Product Support = 8.4

• Price = 6.3

• Reputation = 9.2

I.A. Analyst's Evaluation

Sage Intacct stands out with its unique blend of features. It's not just a financial accounting solution but also an ERP. It provides solid financial management and ensures GAAP compliance. The AICPA's endorsement of this product adds credibility to its capabilities.

While it may not be as robust as other ERP solutions, its unique features make it a significant option in this comparison. Its add-on applications for HR, employee management, and payroll make it a versatile choice for various organizations.

Sage Intacct may be an affordable, comprehensive solution for medium or growing healthcare, nonprofits, professional services, and retail entities looking to scale from basic financial software to a more complex platform.

Take healthcare, for example. Sage Intacct is a HIPAA-compliant solution that may suit smaller hospitals and healthcare organizations. Not many of the other ERPs in our comparison are HIPPA compliant.

Sage Intacct is browser-based subscription software. Its core functionality includes accounts receivable and payable, cash flow, general ledger, order management, reporting, and dashboards. It also offers a flexible tax engine with Avalara integration, making tax computation, reporting, filing, and auditing efficient.

Sage Intacct offers scalable multi-entity support and project accounting; however, features like interactive multidimensional reporting, inventory, and CRM are add-ons. Fixed asset management, multi-entity, and global capabilities are also extended (optional) capabilities.

Manufacturing operations are also an extended functionality for Sage, It balances flexibility and control, positioning you to optimize workflows and processes for better production business outcomes. Still, many other ERPs within our study do a better job at manufacturing.

Sage Intacct is a highly adaptable product, offering scalability regarding functionality, users, organizational size, and multi-entity capabilities. This adaptability makes it a good fit for businesses of varying sizes and structures, ensuring it can grow with your organization.

Sage Intacct is well-suited for businesses with 20 to 200 employees and between $3 million and $200 million in annual revenues. Companies within this size range can benefit from its comprehensive features. However, it may be over the budget for smaller companies.

Sage Intacct is a sophisticated financial application that often requires substantial user training to maximize its feature set. Financial professionals familiar with accounting processes will utilize the software far more quickly than other users. For this reason, this solution may not be the first choice for organizations needing an ERP that doesn't have accounting professionals on staff.

Insightful Accountant®

PROFILE

SAP Business One provides comprehensive business ERP capabilities for small and medium-sized companies.

Excellent finance, sales, supply chain, production, and project management features can help your business become more efficient, productive, and profitable.

Description

➢ *Despite being advertised for small to mid-sized businesses, it tends to be used by larger entities due to cost.*

➢ *Highly customizable solution is likely to require more support than other ERPs in this study.*

➢ *Typically used by businesses with $5M+ in annual revenues.*

Comparison

[QuickBooks Desktop Enterprise]
> 4.0

[SAP Business One]
> 4.1

SAP Business One

3999 W, Chester Pike

Newtown Square, PA 19073

Phone: 610-661-1000

sapnetwork@sap.com

Evaluation

SAP Business One is suitable for mid-sized businesses needing a specialized ERP that streamlines core business operations and offers centralized data management.

- Offers both cloud and on-premise deployment.
- Pricing is complex based on features, users, and installation. Maybe higher than other study ERPs.

Pros

- Use of AI-powered Business Intelligence is extensive in this ERP.
- Well-suited for inventory-centric businesses with warehouse requirements.
- Equally well-suited for project-based businesses.
- Companies wanting 'host your own' should explore it.

Cons

- The Stand-alone version will require additional technical and information support and related costs.
- Probably too expensive for many QuickBooks migrators.

Comparison Factors *(1 to 10)*

- Easy of Implementation = 7.8
- Configurability/Customization = 8.8
- Automation capabilities = 8.5
- Mobility = 8.1
- Ease of use = 8.2
- Accuracy = 9.4
- Product Support = 8.4
- Price = 6.3
- Reputation = 8.6

I.A. Analyst's Evaluation

SAP Business One (SAPB1) is tailored for midsize businesses. It offers a comprehensive solution for managing finances, sales, customer relationships, and operations in one package. By integrating core business processes and functionalities with advanced analytics, it's an ideal companion for your business's future growth.

SAPB1 offers advanced built-in analytical capabilities and sophisticated complementary tools, allowing you to instantly gain business insights that support optimized decision-making. You get all the relevant information about your company at one glance; however, you can also easily create standard or customized reports from real-time data for business planning and audit reviews.

SAPB1 features a user-friendly web interface designed to simplify business management tasks. Process bots automate repetitive tasks and improve process workflows based on SAP's functionality and best practices.

SAPB1 streamlines financial operations by automating accounting tasks, managing multi-currency transactions, and supporting tax calculations. It handles banking activities, reconciles accounts, and tracks cash flow and budgets. SAPB1's virtual fixed asset function frees you from repetitive manual data entry. Integrating financial operations with purchasing and sales in real-time enhances transaction speed and visibility of cash flow. Many companies perform cost accounting by profit center to determine company profitability. SAPB1 enables you to define profit centers so that you can monitor and regulate the costs of your business processes.

With SAPB1's HR feature, you can efficiently capture, manage, and maintain pertinent employee details, contacts, records, and data. This robust functionality ensures that you are always in control of your workforce, providing reassurance in your HR management.

SAPB1 offers tools to efficiently manage the entire sales process and customer lifecycle, from initial contact to after-sales support. Its integrated functionality provides a complete view of prospects and customers, helping you turn prospects into customers, boost sales and profitability, and enhance customer satisfaction.

SAPB1 streamlines the order-to-pay cycle for small and midsized businesses, managing vendor quotes, purchase requests, and payments. Integrated reporting tools enable supplier comparison for better deals and cost savings.

SAPB1 is an inventory-centric ERP. You can manage stock in multiple warehouses, divide each warehouse into subzones, set up allocation rules, optimize stock movements, and reduce picking time. Of course, it supports various units of measurement and various costing methods, real-time stock monitoring, and seamless transfer tracking. Easily manage pricing strategies, apply discounts, and record goods receipts, stock transfers, consignments, drop-ship, and inventory cycle counts with minimal effort.

Because production is a foundation of SAPB1, you can create multilevel bills of materials, issue, and release production orders, and maintain accurate production costs via global BOM maintenance. It also tracks shipments relative to available item locations.

For midsize businesses focused on manufacturing and distribution, SAP Business One ERP provides numerous features to help you become more efficient, productive, and profitable.

PROFILE

SYSPRO is a near-perfect ERP for major manufacturers and distributors with medium-sized to large businesses.

It is highly customizable due to its modular design, relatively easy to use after set-up and configuration, and will scale from a few users to hundreds of users, as needed.

Description

➢ *Priced for the core product in the same class as several of the upper tier of this ERP study.*

➢ *Payroll and Human Resources are not available in SYSPRO.*

➢ *Complex requirements should be phased in to avoid impact of change from a simpler software.*

Comparison

[**QuickBooks Desktop Enterprise**]

4.0

[**Zoho**]

4.1

SYSPRO

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Evaluation

SHSPRO works well for distribution and manufacturing operations requiring tight controls.

- Great for parts, chemicals, electronics, metal fabrication, food supplements, and cannabis.

- Suitable for businesses with 50 to 500 employees, with 2 million to 200 million in annual revenues.

- Can support almost any number/type of users.

Pros

- SYSPRO's core ERP will be sufficient for many manufacturing and distributing companies.

- Multiple add-on modules enhance core functionality, which can support highly complex production requirements.

- While SaaS Cloud is now the standard offering, they still offer on-premise and hybrid versions.

Cons

- SYSPRO doesn't offer Payroll or Human Resources; this will require the use of a 3rd-party solution or provider.

- An 'active' system administrator is essential to success.

Comparison Factors *(1 to 10)*

- Easy of Implementation = 8.1

- Configurability/Customization = 8.0

- Automation capabilities = 8.2

- Mobility = 8.2

- Ease of use = 8.2

- Accuracy = 8.9

- Product Support = 8.2

- Price = 6.3

- Reputation = 8.8

I.A. Analyst's Evaluation

SYSPRO ERP works well for midsize businesses and large enterprises that need tight control over their distribution and manufacturing operations. It supports custom job shops, engineer-to-order, configure-to-order, assemble-to-order, made-to-order, make-to-stock, and mixed mode operations. It works well for automotive parts and accessories, electronics, fabricated metal, food and beverage, industrial machines and equipment, packaging and plastics, and rubber.

SYSPRO is appropriate for organizations with 50 to 500 employees. Its modern graphical user interface and vast features simplify navigation, empowering users with varying levels of technical proficiency.

SYSPRO is modular, making it easy to customize for your needs, including warehousing and inventory management. You *"get everything you need and nothing you don't"* by adding or deleting modules as your business grows and your requirements evolve. SYSPRO modules include foundation (basic and advanced), financial, manufacturing (basic and advanced), distribution (basic and advanced), and several other add-ons.

SYSPRO's core financials include Accounts Payable, Accounts Receivable, General Ledger, Sales, Purchases, Bank Reconciliation, Cash Management, and Fixed Assets. The Chart of Accounts structure is very flexible. A separate multi-currency module is available. SYSPRO contains numerous reports; however, it also offers Crystal Reports as an option for more sophisticated financial reporting capabilities. This core lacks payroll and human resource functionality. SYSPRO doesn't provide these critical business features as part of its ERP, so a SYSPRO user must rely on a third-party resource.

SYSPRO offers various dashboard configurations for executive-level managers, payables personnel, receivables staff, and manufacturing personnel. There are more widgets available to customize these dashboards than you can count, and administrators can control which widgets users can access. CRM is an optional module for managing sales campaigns, pipelines, and customer details and integrates with SYSPRO sales features.

Their basic Manufacturing module focuses on distribution and manufacturing with capabilities such as bill of materials (BOM), kitting, bin tracking, bar coding, and inventory tracking. All of the inventory valuation options are available. SYSPRO can handle multiple warehouses and inventory in different locations, it can also apply different pricing and costing methods at each location, with multiple units of measurement also supported.

SYSPRO's advanced Manufacturing and Distribution modules are robust and comprehensive, providing production scheduling features like the Materials Requirements Planning (MRP) module and Shop Floor Production. SYSPRO's Product Configurator Wizard allows users to set components and operations specific to items, streamlining processes and reducing the risk of errors, providing security in the production process. Even though SYSPRO doesn't offer payroll, it lets you enter labor costs into your production costs to get a more accurate idea of the total expense of producing any product.

SYSPRO's core product is priced competitively on a per-month, per-user basis, which aligns with other ERPs at the upper end of this study. Even though the cost will increase depending on the modules a user selects, the value and efficiency of SYSPRO should deliver a return on investment for major manufacturers.

SYSPRO is very efficient and may be the perfect ERP for small, medium, and enterprise-level manufacturers and distributors willing to use a 3rd-party Payroll application or provider.

PROFILE

Zoho One offers a collection of apps that essentially allow you to build your own ERP based on your requirements.

Apps range from Books (accounting) to Inventory, CRM to Field Services, Invoices to People, Projects to Inventory, and more. Unfortunately, it lacks major manufacturing ability.

Description

➢ *Priced on an 'All employees' or 'Select employee' (less than all) basis.*

➢ *Select the apps you need from more than 25 available.*

➢ *Offers apps that can substitute for other existing subscriptions, like Mail, Spreadsheet, Presentation, etc.*

Comparison

[**QuickBooks Desktop Enterprise**]

| 4.0 |

[**Zoho**]

| 4.3 |

Zoho (USA)

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▶ Evaluation

Zoho One offers a suite of apps that are designed to work with one another because they all use the Zoho platform. The user options for the apps that meet their needs and requirements.

- Suitable for many small to smaller mid-sized businesses that have specific, but not necessarily complex needs.

- Has a limit of 25 users

▶ Pros

- Configurability prevents users from paying for options and features they do not need.

- Well suited for even inventory-centric businesses like retail because it offers both eCommerce and Point of Sale app options.

- Offers marketing, campaign, project-focused activity support, and related accounting.

▶ Cons

- Payroll App is available to connect to People App but is not included in Zoho One pricing.

- Manufacturing capability light-at-best (kits, bundles, etc.)

▶ Comparison Factors *(1 to 10)*

- Easy of Implementation = 8.8

- Configurability/Customization = 9.0

- Automation capabilities = 8.2

- Mobility = 8.4

- Ease of use = 9.1

- Accuracy = 9.2

- Product Support = 8.4

- Price = 8.2

- Reputation = 8.4

I.A. Analyst's Evaluation

Zoho One is the second of two ERPs that are essentially 'build it yourself' rather than preconfigured or configured by the ERP developer for you. So, this evaluation takes a different approach than with other ERPs in this study.

Zoho is a well-respected brand worldwide because it offers products used in many different countries, with multi-language and multi-currency functionality. Zoho One is a 'suite' offering of various Zoho apps that can be clustered together into an ERP solution you configure to meet your specific needs and which you can be confident will share their data from one app to another. I'll mention that Zoho One has a pricing structure based on either 'all employees' or 'some employees', and that's the initial choice users must make in selecting Zoho.

You have forty-five (plus) apps you can incorporate into your Zoho One subscription self-configured ERP. We will begin with Books, the accounting app, and then add Invoice, Billing, and Expense. As their name implies, each of these apps expands upon the basic finance features within Books.

Almost any business transitioning to an ERP will want to keep track of work performed job by job, so you will want to add Zoho's **Projects** to assist you with that functionality. The **CRM** and **Bigin** apps can boost sales and customer management, but you could also look at **Bookings**, which incorporates and expands on these two apps and is essentially project-oriented. **SalesIQ** is another app that enhances additional functionality you might explore. **Checkout** is the Zoho module associated with payment options, collections, payment integrations, and such, but they also offer **Payment Forms** that are alternative payment solutions.

If you are selling 'stocked products', then **Inventory** is a critical app. You should evaluate if the incorporated level of features like sales and purchasing are sufficient to meet your requirements without having to add on some of the sales-related features I mentioned in the last paragraph. And while Inventory includes what Zoho calls 'manufacturing,' it is nothing more than 'bundling/kitting'; it isn't designed for complex manufacturing requirements. It incorporates multi-warehousing, barcodes/RFID, multi-channel tracking, picking/packing, and shipping. I will mention that Fishbowl does have a version of their product that works with Zoho via connectivity to the CRM App.

Zoho offers a **People** app that is essential for HR but doesn't include payroll. An available app, Zoho Payroll for Zoho People, does integrate with People, but it is NOT included in the Zoho One included apps, which means it's optional. However, since many businesses use an outsourced payroll processor, that may not be a game changer if you are considering Zoho One otherwise.

Zoho offers an 'Enterprise' option called Zoho Creator, which lets you configure your own ERP from templates based on many of the Zoho One Apps we have discussed above; however, while they say it includes manufacturing, they still don't offer a genuine manufacturing assembly or batch functionality. So, while it may provide more than we've described above and is designed for businesses with larger demands than the functional levels of Zero One but that's not why we included Zoho One. We wanted to provide our study readers with various options for their ERP needs, from entry-level ERPs, like Zoho One, to more sophisticated ERPs.

Zoho One can provide various ERP functions ranging from finance to CRM to Sales and Marketing, eCommerce integration, and fundamental Inventory capabilities. It is not, in our opinion, a 'Manufacturing' ERP solution. As with at least one other solution we explored in this study, Zoho One lets you decide what features and functions you want and need, which can then be clustered into one integrated solution that we believe is an entry level ERP. Perhaps in a future ERP study, we will include Zoho Creator.

ERP Alternatives to QuickBooks

Earlier, we discussed the nine (9) comparison factors we used in evaluating our ten ERPs. On each of the Summary pages, you have seen scores reported for these criteria:

- ❖ Ease Implementation
- ❖ Configurability/Customization
- ❖ Automation capabilities
- ❖ Mobility
- ❖ Ease of use
- ❖ Accuracy
- ❖ Product Support
- ❖ Price
- ❖ Reputation

The chart below reflects the composite ratings for the ten ERPs based on these criteria. The chart also reflects the 'Composite Score' represented by the bar graph on each Summary Page for each ERP. In all cases, the composite score was relative to a composite score for QuickBooks Desktop Enterprise, which was evaluated using the same methods before starting the comparison. It ranked 4.0 out of 5.0.

Comparison Factors	Acumatica	Epicor ERP	Intuit Enterprise Suite	MS Dynamics 365 Business Cen. Premium	NetSuite	Odoo Custom	Sage Intacct	SAP Business One	SYSPRO ERP	Zoho One Enterprrise
Implementation Ease	8.4	7.8	ID	7.5	8.0	9.0	8.1	7.8	8.1	8.8
Configurability	8.8	9.2	ID	8.9	8.7	9.0	8.6	8.8	8.8	9.0
Automation capabilities	8.8	8.0	ID	8.4	8.6	8.7	8.5	8.5	8.2	8.2
Mobility	8.4	7.8	ID	8.1	8.4	7.7	8.0	8.1	8.2	8.4
Ease of Use	8.8	8.1	ID	8.8	8.4	9.1	8.4	8.2	8.2	9.1
Accuracy	8.8	8.4	ID	8.3	8.8	8.8	9.6	9.4	8.9	9.2
Product Support	8.7	8.4	ID	8.8	8.4	7.1	8.4	8.4	8.2	8.4
Price	7.5	6.3	ID	7.5	7.5	8.9	6.3	6.3	6.3	8.2
Reputation	9.1	8.8	ID	9.8	9.8	8.8	9.2	8.6	8.8	8.4
Overall	8.589	8.089	ID	8.456	8.511	8.567	8.344	8.233	8.100	8.633
Comparison Score	4.3	4.0	0.0	4.2	4.3	4.3	4.2	4.1	4.1	4.3

The chart below reflects the composite scores of our ten ERPs based on the continuum we previously established from less sophisticated to more sophisticated.

Odoo Custom	Zoho One Enterprrise	Intuit Enterprise Suite	Acumatica	NetSuite	Sage Intacct	SYSPRO ERP	MS Dynamics 365 Business Cen. Premium	Epicor ERP	SAP Business One
4.3	4.3	0	4.3	4.3	4.2	4.1	4.2	4.0	4.1

Less sophisticated functionality ◄──────────────────────────────────► Most sophisticated functionality

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ERP Alternatives to QuickBooks

Another way of looking at this continuum is using a stair-step method of presentation.

Less sophisticated functionality ← → Most sophisticated functionality

	Odoo Custom	Zoho One Enterprrise	Intuit Enterprise Suite	Acumatica	NetSuite	Sage Intacct	SYSPRO ERP	MS Dynamics 365 Business Cen. Premium	Epicor ERP	SAP Business One
Tier 4 - Higher Special Mkt									4.0	4.1
Tier 3 - Lower Special Mkt							4.1	4.2		
Tier 2 - Mid-market				4.3	4.3	4.2				
Tier 1 - Entry Level	4.3	4.3	0							

The bottom Tier 1 represents the three ERPs with the least sophistication based on the various factors used in the study. Of this tier, Odoo and Zoho One received a composite score of 4.3. Intuit Enterprise Suite could not be adequately evaluated and had a composite score of 0.0.

Tier 2 contained our three 'mid-market' ERPs, which are probably the best-known of our ten ERPs. Acumatica and NetSuite received composite scores of 4.3, with Sage Intacct just one-tenth point behind at 4.2.

Tier 3 was our 'middle-small to mid-size' specialized market ERPs. Syspro (scoring 4.1) focuses on manufacturing, wholesale, and distribution. MS Dynamics 365 Business Central-Premium (scoring 4.2), even with Manufacturing (limited) capabilities, is still better aligned to finance, non-profit, and professional services.

Tier 4 represents our 'mid-size to bigger' organizations requiring specialized ERP products. Epicor scored 4.0 and SAP Business One scored 4.2.

At this point, you should know which of our ten ERPs best fit your requirements. By reviewing the ERPs by type and considering their scoring factors on a tiered basis, which, by the way, will also roughly correspond to the cost of the solution (lower on the continuum, lower price-point, higher on the continuum, higher price-point) should at least have an idea as to the ones you want to consider.

ERP Alternatives to QuickBooks

Preparations to go to the next step

In the introduction, I told you that I would give you some preparatory steps for considering a migration. These are not actual migration steps.

❑ **Establish an ERP team –** select key personnel from your organization's areas, departments, or divisions. I wouldn't go overboard on the 'finance' offices even though we tend to think of this as the replacement for 'the accounting platform' currently in use (like QuickBooks). Believe me, the accounting personnel will adapt to any of our ten solutions far faster and easier than any other department in your organization.

> You need a good representation of your people, especially when they will be using a computerized tool for the first time. The more they feel involved in deciding what will work best, the more likely they are to adopt it as 'their own.'

❑ **Establish an ERP budget -** don't even think you will get into an ERP for the kind of "pocket change" you have paid for QuickBooks. True, one of the Tier 1 products, like Odoo, might look attractive from a cost standpoint, but you need to check it out thoroughly by running a trial test on the same kinds of data you would be capturing if you were using it as your ERP.

> Since QuickBooks Enterprise hasn't had a price increase in 3 years, you should take your current subscription price for Enterprise, Payroll, Payments, and Bill Pay, then multiply that by 2.4. Now multiply that figure by 1.3. That is the amount you will likely pay for what you have by your 2026 renewal if Desktop Enterprise is still around. Intuit is losing a lot of money on Desktop by dropping Pro/Premier sales. They will have to make it up, and the most likely place is QuickBooks Desktop Enterprise.

> That's the amount I would budget for an ERP annual subscription minimum. Remember to multiply that figure by 150% to get a reasonable estimate of the installation and upgrade costs you will pay that first year over and above your annual subscription.

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ERP Alternatives to QuickBooks

Preparations to go to the next step

In the introduction, I told you that I would give you some preparatory steps for considering a migration. These are not actual migration steps.

❑ **Identify an ERP Consultant –** ask your current QuickBooks ProAdvisor if they know of a consultant who works with 'XYZ' ERP that you have preliminarily identified. You might be fortunate to find out that your own ProAdvisor supports one of these ERPs, or who knows someone who does?

> An alternative is to search the ERP Developer's website and look for their 'Partners' or 'Value Added Resellers.' If they exist, I always suggest you look for someone in your immediate geographical area. By immediate, I mean no further than 'one state' away. You may end up with such an individual or firm when the ERP Developer determines your territory, and who might best be the best resource should you become a client.

❑ **Formal Consultation with Developer –** head to the Developer's website and ask for 'Sales.' ***Now that you've done it, you will be stuck in their Rolodex card index for the rest of history.*** Not really; I think I'm the only person on the planet who still uses not one, but a 'double wide' two-set Rolodex card index.

> I'm just saying that once they get your name, email, and phone number, they will haunt you to the day either you or they die. But that's just the way sales work these days. Even so, these are the people you need to start a conversation with unless your 'consultant' is a Partner or VAR for that particular ERP, and then they can make the formal referral for you.

> Let them know how well-prepared you are… Tell them Murph told you this was the ERP for you. Then they will ask you, ***"Who the heck is Murph?"*** Just never mind that, go ahead let them know that you need an ERP and you have a list of 80 things it must do. Then tell them you have a twelve-person evaluation team ready to review everything they tell you, and every stitch of paper they send you.

ERP Alternatives to QuickBooks

Preparations to go to the next step

By this time, you will finally get the attention of that 'Ruby Receptionist' code-talker on the other end of the phone, unless you tried to use the Chat option from their Home page. If you are a 'chatter,' then you can expect to have to go through 2 bots and an 'off-shore' screener before you ever actually get to sales.

Sooner or later, you will make your way to a real live 'Sales Representative' who will be thrilled to death that you sound so prepared you might be able to 'close on a deal' by the end of the month rather than 6 months of teaching you 'how to aim' before your finally 'pull the trigger' on this project.

The most exciting part of your preparations is that you have a 'budget number' from which they can build upon your expectations while escalating the price along the way.

Work with the Developer – you and your team then begin all the fun of working on an almost daily basis (more like every 3rd day) with pushy sales and technical people wanting to know this or that, wanting you to provide a checklist or spreadsheet of questions, and finally issuing you a quote that flabbergasts the entire team. But never fear, "tell them 'No way' and see how quickly that quote dissolves into something more reasonable. Each time you say, "Over my budget," the closer the following quote will be.

Be patient. In the long run, it will likely work out. If not, go to your second choice out of these ten and start the process all over again.

But the way I think about it is like this. Would you rather build an ERP to get exactly what you need even if it costs a little more, but potentially will save you money in the long run, or would you rather sit on your 'duff' and wait for QuickBooks to tell you that your software is going up by 50% over each of the next 3 years until they say, "*so sorry, we are sunsetting your QuickBooks at the end of this subscription period.*"

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Supplemental Chart: ERP Feature Comparison

Evaluation Features and Functions	Acumatica	Epicor ERP	Intuit Enterprise Suite	MS Dynamics 365 Business Cen. Premium	NetSuite by Oracle	Odoo Custom	Sage Intacct	SAP Business One	SYSPRO ERP	Zoho One Enterprise
Accounts Payable	X	X	X	X	X	X	X	X	X	X
Accounts Receivable	X	X	X	X	X	X	X	X	X	X
Appointments	X	V	X	X	X	X	O	X	X	A
Assembly Engineering Change Control	X	X		L	X	X	O	X	O	
Bank Feeds	X	X	X	X	X	X	X	X	X	X
Budgets (Multi-level)	X	X	X	X	X	X	X	X	X	X
Business Analytics/Metrics	X	X	X	X	X	X	X	X	X	X
Calendar Boards/Scheduling	X	V	X	X	X	X	X	X	O	A
Cash/Currency Management	X	X	X	X	X	X	X	X	X	X
Change Orders	X	X	X	X	X	X	X	X	O	A
Check issuance/printing	X	X	X	X	X	X		X	X	X
Compliance	X	X		X	X	X	X		X	
Contracts and Renewals	X	X	X	X	X		X	X	X	A
Customer Portal	X	X				X	X			A
Customer Relations Management (CRM)	X	X	X	X	X	X	O	X	X	X
Dashboards	X	X	X	X	X	X	X	X	X	X
Document Management (Capture/Linkage)	X	X	X	X	X	X	X	X	X	X
eCommerce Connectors	X	X	X		X	X	O	X	O	A
Expense Management	X	X	X	X	X	X	X	X	X	X
Field Service Mobile App	X	X		3	X	X	P	P	O	
Fixed Assets	X	X	X	X	X	X	X	X	X	A
Flexible Billing/Payment Options	X	X	X	X	X	X	X	X	X	
General Ledger (with Full Audit Trail)	X	X	X	X	X	X	X	X	X	X
Global Financial Compliance	X			X	X	X	X	X		X
Human Resource Management	X	X	O	X	X	X	X	X		X
Inbound Logistics (Landed-cost, In-transit)	X	X	L	O	X	X	O	X	X	A
Items (Non-Inv, Supply, Consum, Kits)	X	X	X	X	X	X	O	X	X	A
Intercompany Transactions	X	X	X	X	X	X	X	O	O	X
Inventory	X	X	L	X	X	X	X	X	X	X
Inventory life-cycle tracking (serial/lot/exp)	X	V	X	X	X	X	X	X	X	A
Inventory valuation (Actual/Avg/FIFO/LIFO)	X	V	L	X	X	X	X	X	X	P
Inventory variant (Matrix-item) Support	X	X	X	X	X	X	O	X	X	X
Invoicing (Auto/Batch/Paymt-integration)	X	X	X	X	X	X	X	X	X	P
Job Costing	X	X	X	X	X	L	X	X	X	X
Link AP Bills	X	X	X	X	X	X	X	X	X	X
Manufacturing Data Collection	X	V		X	X	X	O	X	X	
Manufacturing Estimates	X	V		I	X	X	O	X	X	
Marketing/Campaign Management		X		X	X	X	X	X	O	A
Material Requirements Planning (MRP)	X	X		X	X	X	O	X	X	X
Mobile App/Solution	X		X			X		X	O	X
Multi-currency with Gains/Losses Recognition	X	X	X	X	X	X	X	O	O	X
Multi-dimensionality Supported	X	X	X	X	X	X	X	X	O	X
Multi-entity Capability	X	X	X	X	X	X	X	X	O	O
Multi-language and Localization	X	V		X	X	X	X	O	X	X
Multi-level Bills of Material	X	X		X	X	X	O	X	X	
Multi-location Functionality	X	X	O	X	X	X	X	X	X	X
Order Management (Estimates/Quotes)	X	X	X	X	X	X	X	X	X	X
Outbound Logistics (Shipping/Freight)	X	V	L	O	X	X	O	X	X	A
Payments	X	X	X	X	X	X	X	X	X	X
Payroll	X	X	X	X	X	X	O	X		X
Point-of-Sale	X	X		X	X	X	L	X	O	
Prepaid Accruals	X	X		X	X	X	X	X	X	X
Pricing Options (Std., Discount, Custom, etc.)	X	X	X	X	X	X	X	X	X	A
Product Configurator	X	V			X	X	O		O	
Production Management	X	V		L	X	X	X	X	X	
Production Planning and Scheduling	X	V		L	X	X	X	X	X	
Project Accounting	X	V	X	X	X	X	X	X	X	X
Project Billing	X	V	X	X	X	X	X	X	X	X
Project/Contract Budgets	X	V	X	X	X	X	X	X	O	X
Project/Contract Management	X	V	X	X	X	X	X	X	X	X
Purchase Order Management	X	X	X	X	X	X	X	X	X	X
Quality Control (Inspect/Defects/Rework)	X	V		X	X	X			X	
Recurrring Revenue	X	X	X	X	X	X	X	X	X	X
Reporting	X	X	X	X	X	X	X	X	X	X
Reporting Consolidation	X	X	X	X	X	X	X	O	O	
Reqisition Management	X	X		X	X	X	X	X	X	
Resource Scheduling	X	V		X	X	X	O	X	X	
Retainage	X	X	X	X	X	L	X	X	X	X
Revenue Recognition	X	X	X	X	X	X	X	X	X	X
Roles, Permissions, Access Management	X	X	X	X	X	X	X	X	X	X
Route and Resource Tracking Maps	X	V		X	X	X	P		O	
Routing/Shop-floor controls	X	V		L	X	X	O	P	O	
Sales Order Management	X	X	L	X	X	X	X	X	O	A
Sales Tax Automation	X	X	X	X	X	3P	X	X	X	X
Service Management	X	V		X	X	X	O	X	X	A
Signature Capture on Documents	X	X	L	X	X	X	X	X	X	X
Tax Management	X	X	X	X	X	X	X	X	X	X
Time Management	X	X	X	X	X	X	X	X	L	X
Vendor Bill Management w OCR	X	X	X	X	X	X	X	X	X	X
Vendor Payments (Print/Wire/ACH)	X	X	X	X	X	X	X	X	X	A
Warehouse Management System	X	X		X	X	X	O	X	X	A
Warranty Management	X	V		X	X	X	X		O	
Workflows (Configurable)	X	X	X	X	X	L	X		O	X

About the Author

William "Bill" Murphy is a (RETIRED FROM ACTIVE PRACTICE) Advanced Certified QuickBooks ProAdvisor who has been a senior contributing Technical Author for *Insightful Accountant*, an E-magazine covering the accounting technology ecosystem since 2013.

'Murph', as he is known to most people, has helped small businesses around the world with QuickBooks since 1989. He focused on resolving QuickBooks technical issues, including data file analysis and repair. A highly recognized Sybase Database Professional, his reputation as a 'data detective' in determining QuickBooks corruption was unparalleled.

Bill has over 45 years of financial and teaching experience and holds both Bachelors and Masters degrees. He served as an Adjunct Instructor for Oklahoma City Community College's Professional Development Office teaching QuickBooks and related business finance courses. He has also instructed thousands of ProAdvisors and QuickBooks users at major conferences, events and webinars.

Bill served as Technical Editor for "Business Analysis with QuickBooks" by Wiley Publishing (2009) and was a technical contributor for the "Managing Your QuickBooks Database" chapter of Laura Madeira's book "QuickBooks 2012 In Depth" (and 2013 & 2014 editions) published by QUE.

During Scaling New Heights 2018, Murph was presented with the Lifetime Achievement Award by Joe Woodard, conference host, and Gary DeHart, publisher of *Insightful Accountant*.

Disclosures