**Demo Date (mm/dd/yyyy): \_\_\_\_\_\_\_\_\_\_\_\_\_**

**Vendor’s Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**ERP Application’s Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Reviewer’s Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Total Score: \_\_\_\_\_\_\_**

*Only include the sections that are applicable to your organization and add additional sections as needed.*

**Functionality:**

|  |  |  |  |
| --- | --- | --- | --- |
| **Requirement #** | **Short description** | **Evaluator’s Notes** | **Rating** |
| *req-01* |  |  |  |
| *req-02* |  |  |  |

**How easy the software is to use:**

|  |  |  |
| --- | --- | --- |
| **Vendor** | **Evaluator’s Notes** | **Rating** |
| *vendor-1* |  |  |
| *vendor-2* |  |  |

**Company history:**

|  |  |  |
| --- | --- | --- |
| **Item Being Evaluated** | **Evaluator’s Notes** | **Rating** |
| *How long has the company been in business?* |  |  |
| *How many employees do they have?* |  |  |
| *How long has the executive team been in place?* |  |  |
| *Have they recently been part of an acquisition?* |  |  |
| *How many of their customers operate in the same vertical market?* |  |  |
| *How financially sound is the vendor?* |  |  |

**Currencies/languages availability**

**Vendor 1:**

|  |  |  |  |
| --- | --- | --- | --- |
| **Item #:** | **Item Being Evaluated** | **Evaluator’s Notes** | **Rating** |
| *vendor-1* | *Menus are translated* |  |  |
| *vendor-1* | *Field labels are translated* |  |  |
| *vendor-1* | *Employees can enter text in all required languages* |  |  |
| *vendor-1* | *Help system is translated* |  |  |
| *vendor-1* | *Resources on vendor’s website are translated* |  |  |
| *vendor-1* | *Technical support is available in required languages* |  |  |
| *vendor-1* | *Product supports required currencies* |  |  |
| *vendor-1* | *Reports can be run in local currency or converted to one currency* |  |  |
| *vendor-1* | *Exchange rates can be updated when necessary* |  |  |

**Software integration**

|  |  |  |  |
| --- | --- | --- | --- |
| **Integration** | **Integration method (API, FTP, etc)** | **Evaluator’s Notes** | **Rating** |
| *application-1* | *API needs to be custom built* |  |  |
| *application-2* | *FTP a CSV file based on a template* |  |  |

**Third-party software requirements**

|  |  |  |  |
| --- | --- | --- | --- |
| **Third-Party Vendor** | **Reason they are required** | **Evaluator’s Notes** | **Rating** |
| *vendor-1* |  |  |  |
| *vendor-2* |  |  |  |

**Implementation partner**

|  |  |  |
| --- | --- | --- |
| **Point to evaluate** | **Evaluator’s Notes** | **Rating** |
| *Years of experience implementing vendor’s solution* |  |  |
| *Company size (i.e. number of employees)* |  |  |
| *Experience in vertical market* |  |  |

**Next steps**

|  |  |  |
| --- | --- | --- |
| **Point to evaluate** | **Evaluator’s Notes** | **Rating** |
| *Estimated project start time once the contract is signed* |  |  |
| *Length of time to implement the ERP solution* |  |  |
| *Implementation approach* |  |  |