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An ERP Buyer's Guide

Presented by:
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Background

Steve Weber – CEO, PaperTrl

- **An ERP & AP Automation thought leader**
  - Co-founder & CEO of **PaperTrl**, a platform that bridges **ERPs, banks, and suppliers** for seamless payables.
  - Deep expertise in **ERP integration, financial workflows, and payment automation**.
  - Formerly founded **nChannel**, a leading cloud-based ERP and eCommerce integration platform

- **Strategic Leadership & Industry Impact**
  - Built **key partnerships with Visa, U.S. Bank, and Elan Financial Services** to enhance payment solutions.
  - Passionate about **helping businesses streamline ERP-based AP processes** and improve financial control and buying the best software to make that easier
  - Leads PaperTrl in providing **predictable, transparent, and efficient** payment automation.

A word from the legal team…

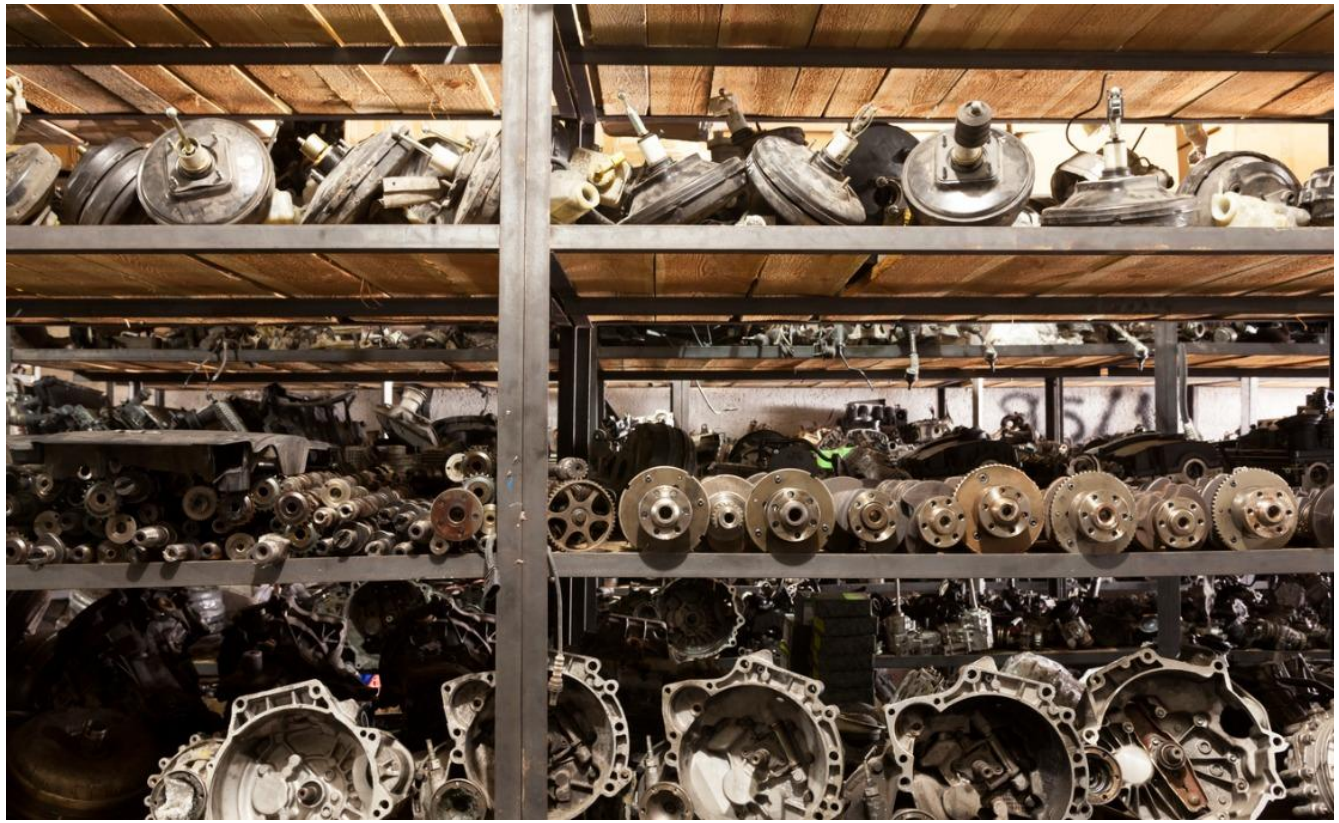
The information presented herein is derived from our direct interactions with the respective companies, their official websites, publicly available online documentation, communications with partner support teams, and thorough efforts to obtain information from each cited source.

The information has been gathered over the last 24 months and while we strive for accuracy and completeness, we cannot guarantee that all information is current or free from errors. This presentation is for informational purposes only and does not constitute professional advice. We disclaim any liability for actions taken based on the information provided herein.

The Revenue That Never Was:

Industry Leading

How an Inflexible ERP System Blocked Millions in Sales



The Revenue That Never Was

The Backstory

- Major group of auto dealerships in Ohio
- More than a dozen locations
- Tens of millions in parts inventory
- Largest OEM part buyer in the U.S.
- Lots of high-volume parts
- Lots of hard-to-find parts

The Opportunity

- Become the largest seller of trusted OEM parts on eBay

The Blocker

- The Proprietary ERP

How did they end up here?

- Although there were alternatives in the market, management stuck with what they knew:
  - The “industry leading” platform was the industry leading platform
    - Switching seemed too risky
  - Cost of conversion seemed too high
    - Human cost
    - Disruption of business
- Required a long-term commitment to tech, and tech is not what auto dealers do
- New features were promised

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The ERP Scorecard

SCORECARD
CRITERIA
CRITRIA
SCORE
SCORE
8/10
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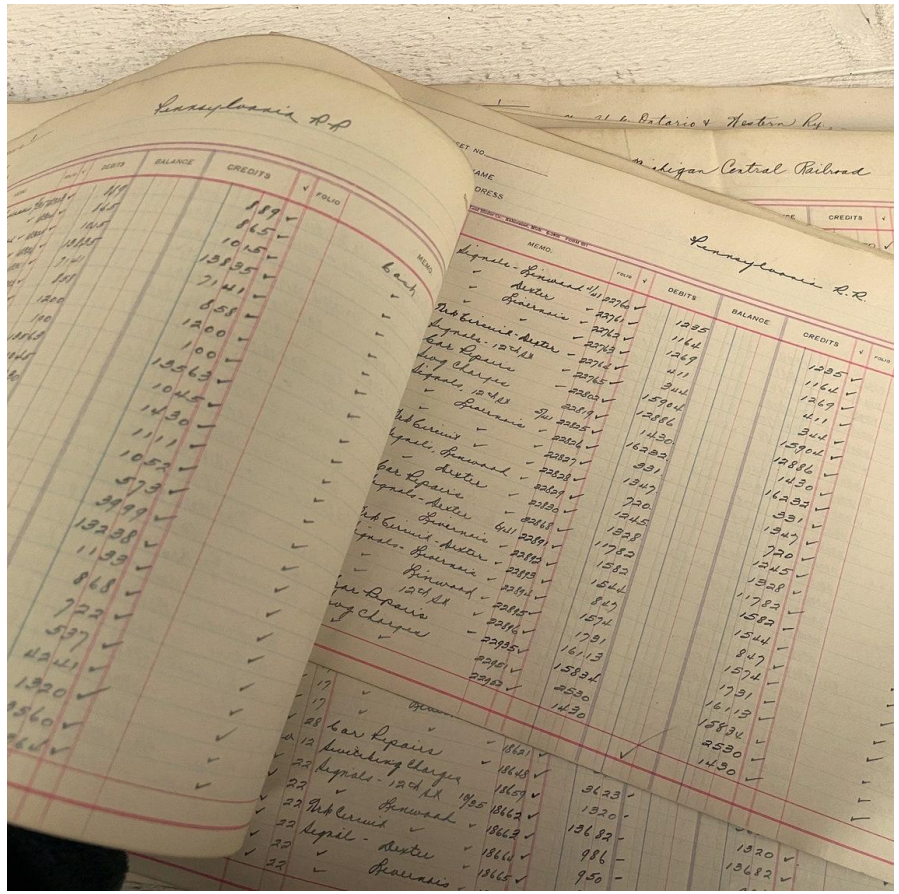
9

Why an ERP scorecard?

- Publishers all use the same buzzwords
  - Cloud-based
  - AI-powered
  - Scalable
  - User-friendly
  - Customizable
  - Business Intelligence
- The core features have become commoditized
  - General ledger
  - Bank integration
  - Dashboards
  - Excel integration
  - Budgeting & forecasting



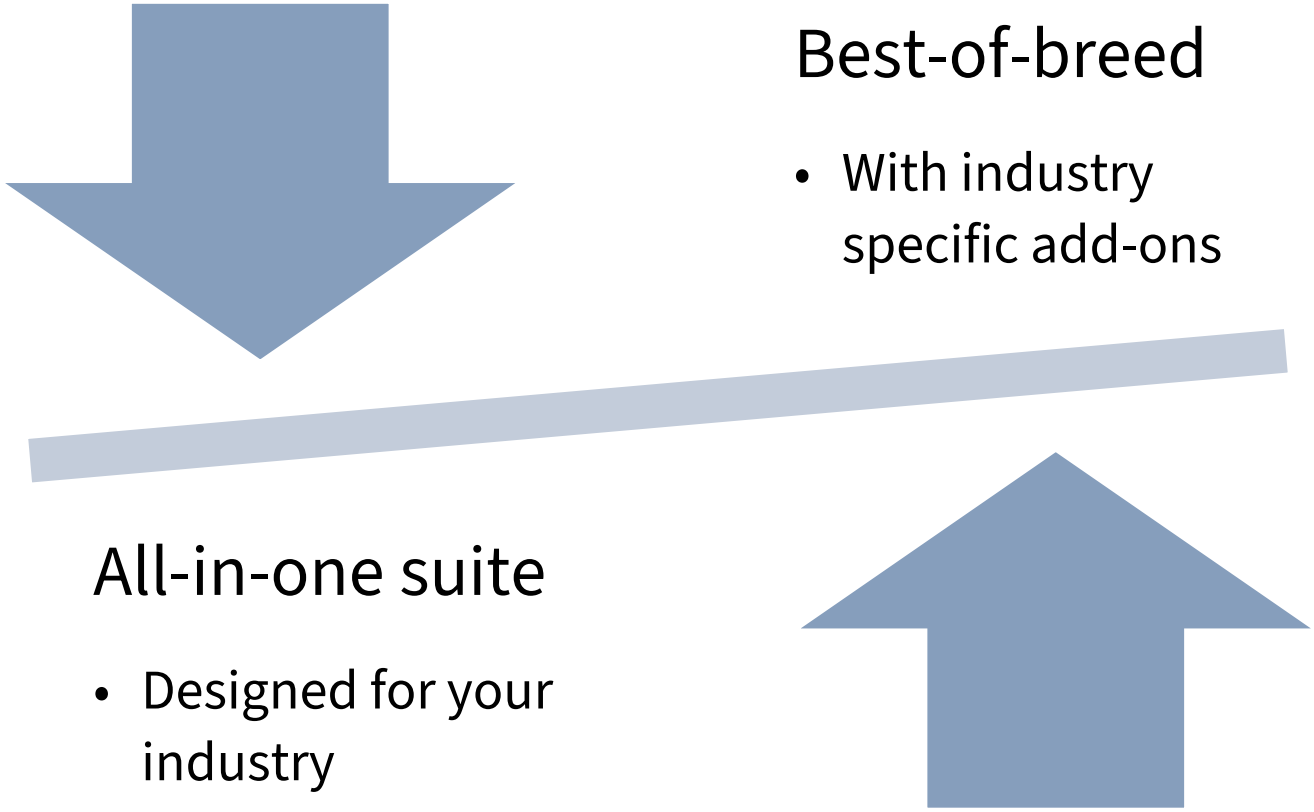
At face value, they all look the same

But when we look under the hood…

The Hot Buttons - Capability	
User interface aesthetics and initial ease of use	✅
Feature checklist satisfaction	✅
Upfront costs and licensing model	✅
Vendor popularity (especially in my industry)	✅
Vendor's time in market	✅

The Seldom Discussed - Adaptability	
Software Architecture	
Data Integration & API	
Vendor Support & Ecosystem	
Master Data Management	

Other considerations:
Best of breed vs. designed for your industry



Best-of-breed

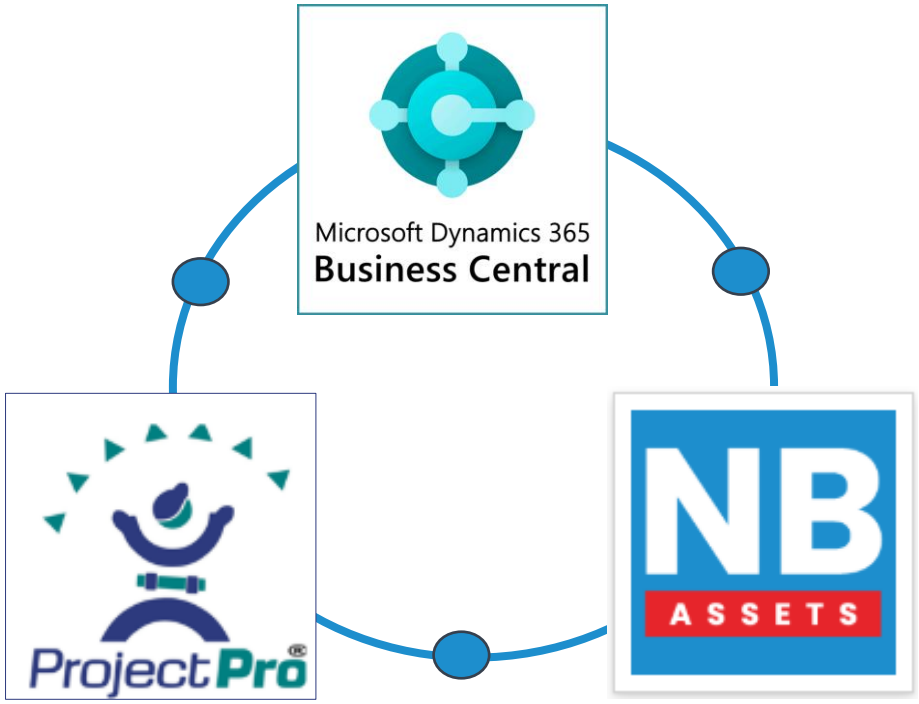
- With industry specific add-ons

All-in-one suite

- Designed for your industry

For example, in construction:

Best-of-breed

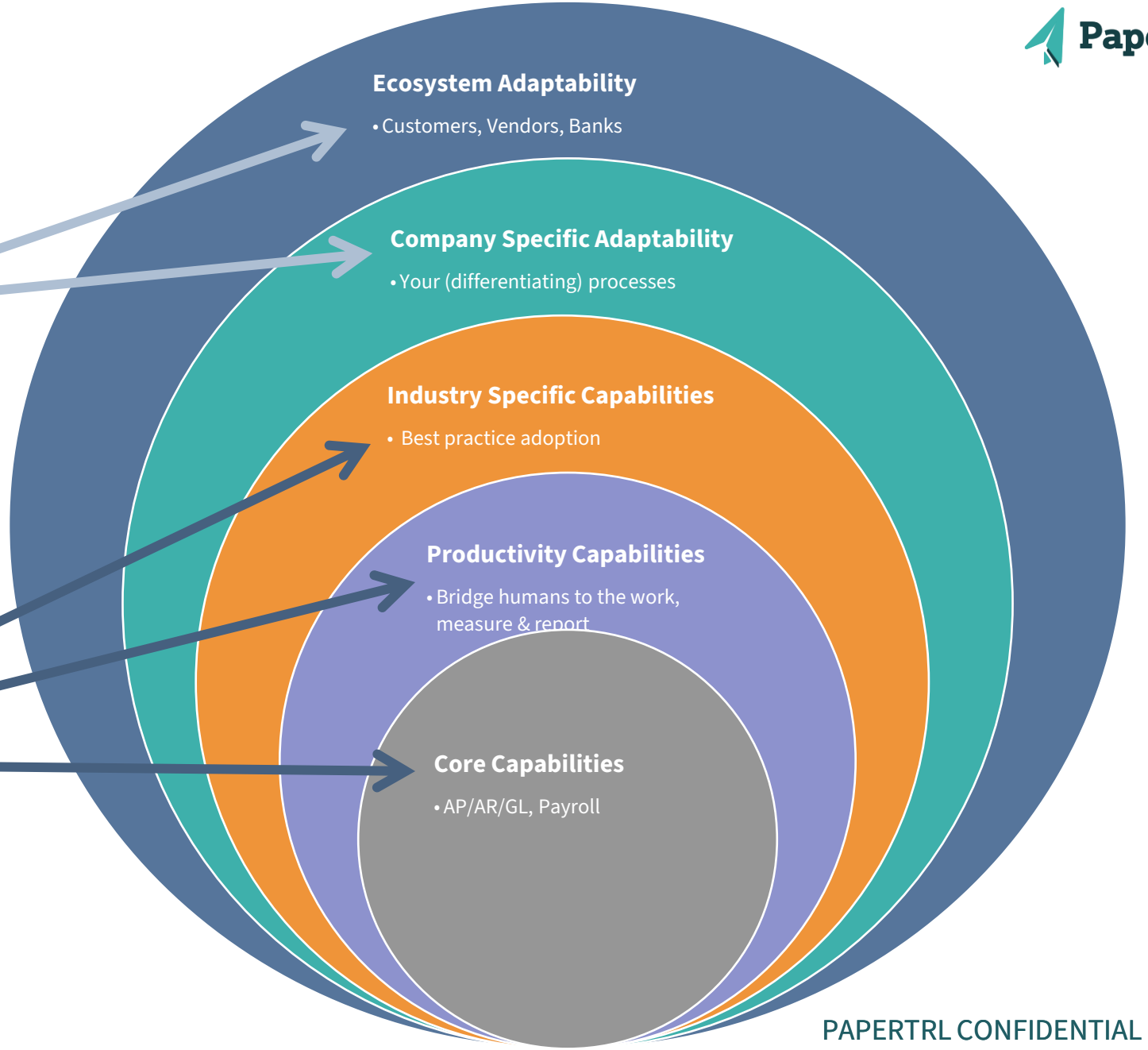


All-in-one

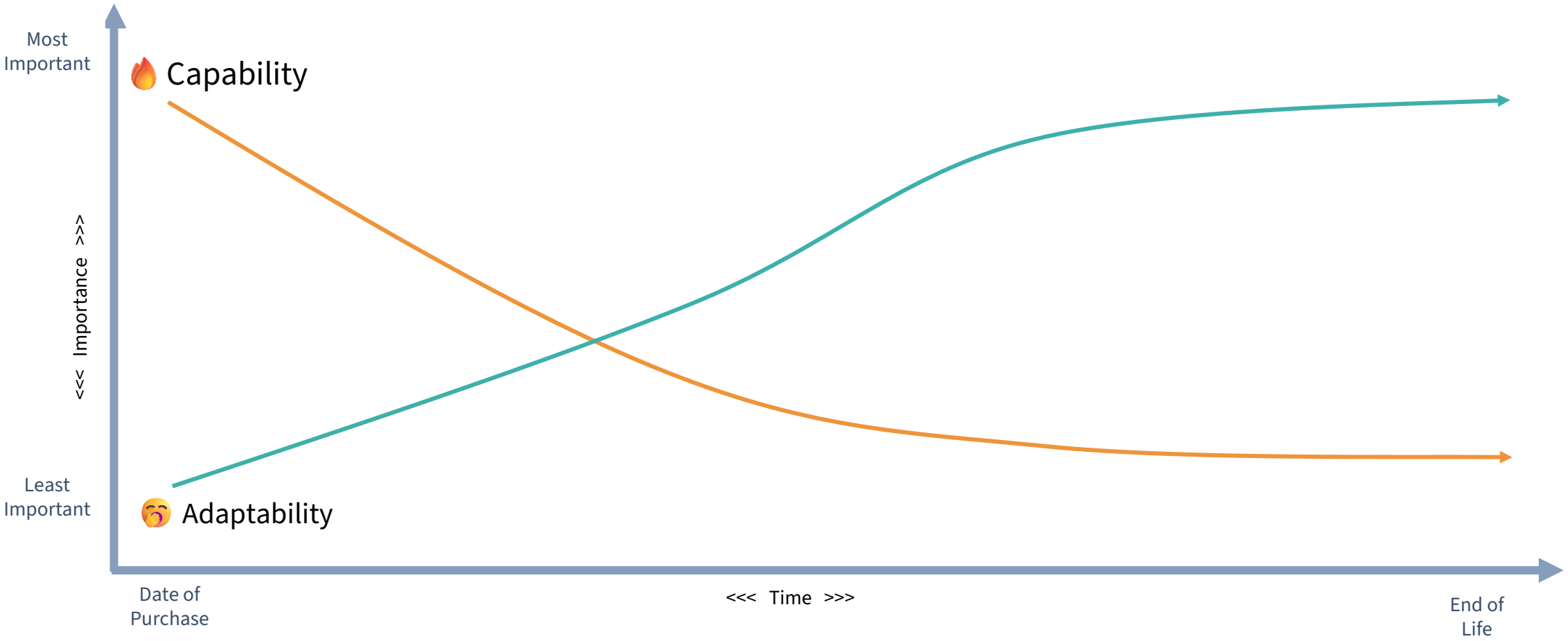
VIEWPOINT®
A TRIMBLE COMPANY

Adaptability:
determines longevity & flexibility

Capability:
determines fit



Long-term value: Capability vs. Adaptability



How we evaluate ERP Platforms

What does "future proof" look like? (Evaluation criteria)

- Leading = 4
- Pacing = 3
- Laggard = 2
- Stagnated = 1

What is the market looking for? (Requirements)

- Direct experience
- User reviews/forums
- Partner testimonies
- Media

How are the vendors doing?

(The players)

- Market leaders
- Companies we have direct experience with

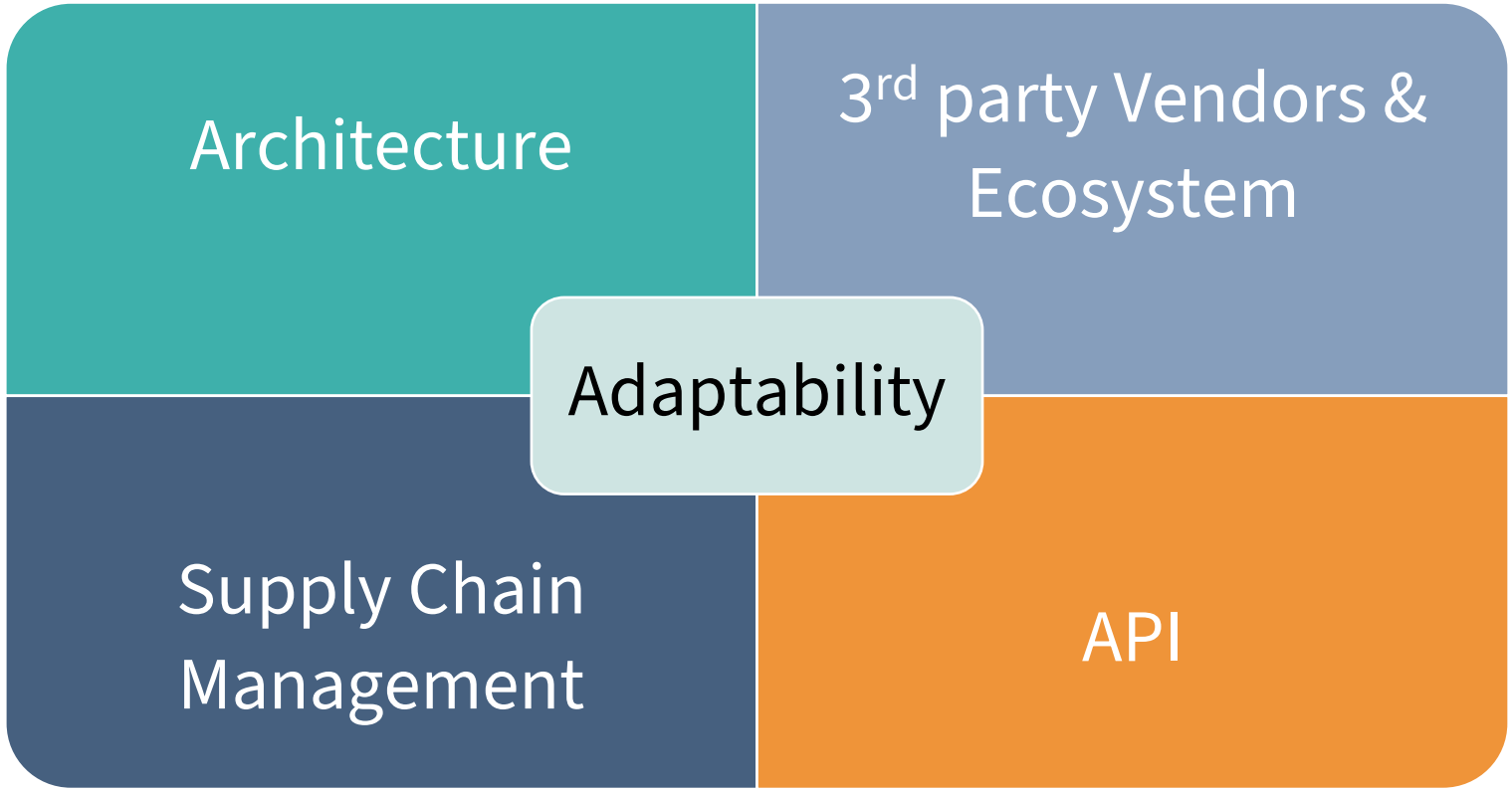
On your own: Evaluating Capability

The Hot Buttons - Capability	
User interface aesthetics and initial ease of use	✅
Feature checklist satisfaction	✅
Upfront costs and licensing model	✅
Vendor popularity (especially in my industry)	✅
Vendor's time in market	✅

Free Resources for capability checklists, guides, etc.

- Panorama Consulting Group – ERP Software Selection Guide (12-Step Process)
  - PANORAMA-CONSULTING.COM
- ERPResearch.com – Free ERP Vendor Selection Criteria Checklist
  - ERPRESEARCH.COM
- Pemeco Consulting – Ultimate ERP Selection Guide: Templates & Checklists
  - PEMECO.COM
- TechTarget (SearchERP) – ERP Vendor Evaluation Criteria and Tips
  - TECHTARGET.COMTECHTARGET.COM
- Embark Consulting – ERP Selection Guide and checklist
  - BLOG.EMBARKWITHUS.COM
- ERP Focus – ERP Requirements Template (Free Download)
  - SPECIALREPORTS.ERPFOCUS.COM

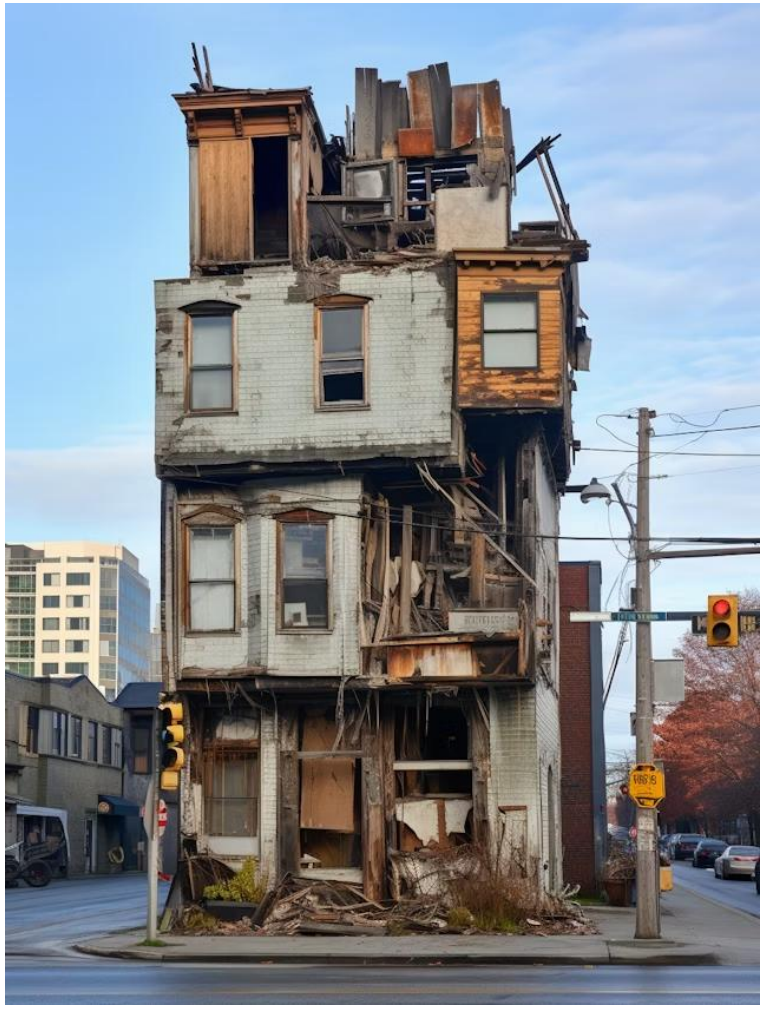
Our Focus: Evaluating Adaptability



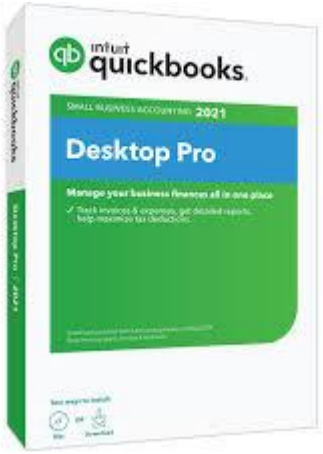
Architecture: Why does it matter?

Does it have good bones?

- Integration complexity
- Cost and time to implement
- Change management
- How happy you'll be with add-ons
- Flexibility to meet future needs



Architecture, why it matters:



vs

intuit QuickBooks Online

Scoring the architecture

- The leaders:
  - Microsoft Dynamics Business Central
  - Intuit
  - Oracle
  - Accumatica
  - Xero
  - Odoo
  - Sage Intacct
- Lagging:
  - CDK
  - DelTek
- The stagnated
  - Quickbooks desktop
  - Sage 100/200/300/400
  - Microsoft Dynamics GP

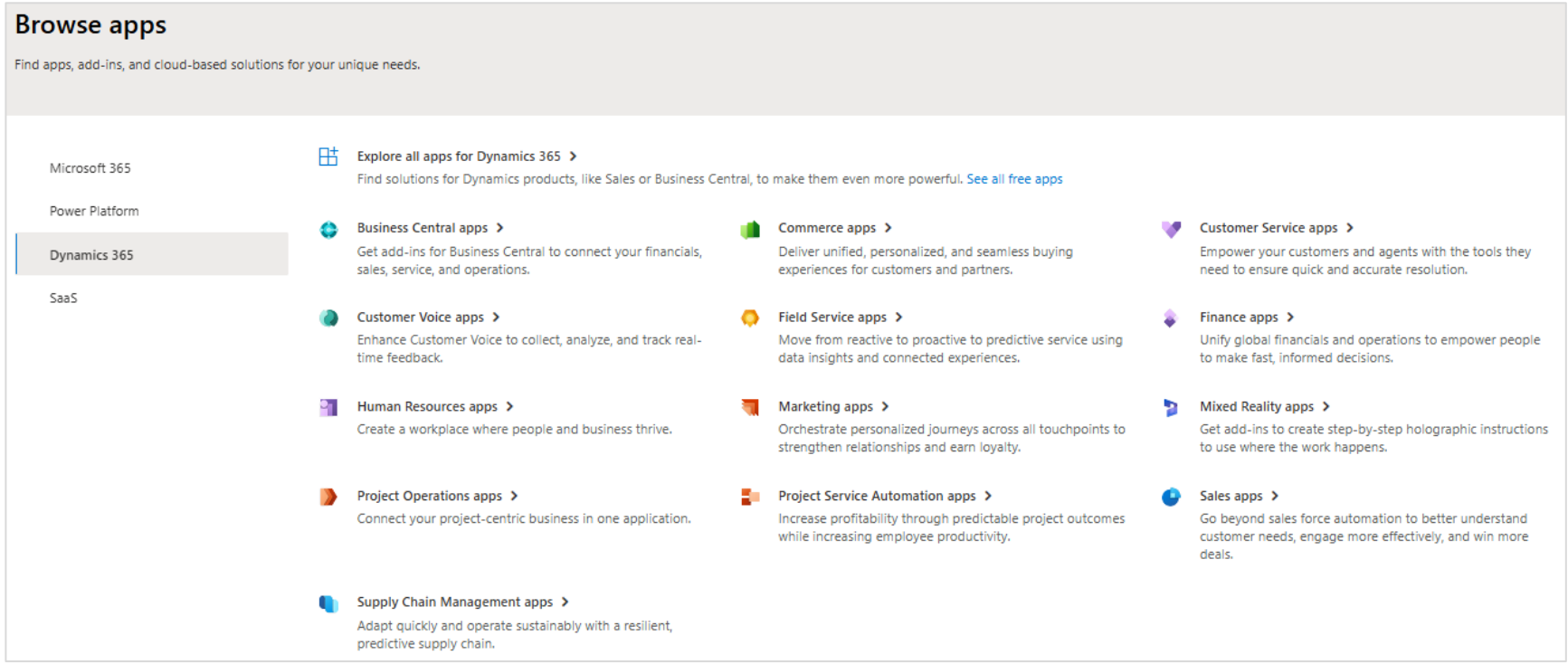
Architecture	
Score	Evaluation Criteria
4 – Leading	• Software packages designed for the cloud, are by definition designed using modern software architecture concepts. • The software should have a REST-based API. REST is the default integration standard. • The software can be extensively customized within a framework that allows for API support of all customizations. The software can be scaled across multiple servers to support resiliency and scalability. • The software uses a market-leading relational database (Oracle, MS-SQL, My SQL or a no-SQL technology like Mongo DB)
3 – Pacing	• The software can be customized within a framework that allows for API support of all customizations. • The software uses a market-leading relational database (Oracle, MS-SQL, My SQL or a no-SQL technology like Mongo DB)
2 – Lagging	• The software has a proprietary or file-based API • The software offers only modest customization • The software does not use a relational database (Oracle, MS-SQL, My SQL or a no-SQL technology like Mongo DB)
1 – Stagnated	• The software is thick client • The software uses a circa-1980 file-based data store by default • The software cannot be scaled across multiple servers • The software has no API

Vendors and Ecosystem: Why does it matter?

VS

Vendors and Ecosystem: Why does it matter?

- Drive innovation
- Thriving ecosystems are indicative of software flexibility
- Protect users from price gouging
- Protection from vendor lock-in
- Ensure long-term investments in the platform



Vendors and Ecosystem

- The leaders:
  - Odoo
  - Microsoft Dynamics Business Central
  - Intuit
  - Oracle
  - Xero
- Lagging:
  - CDK
  - DelTek
- The stagnated

Vendors & Ecosystem	
Score	Evaluation Criteria
4 – Leading	• Partner Certifications – Publisher has a certification program with multiple levels and requires validated customer references for certification. • Developer community – The company embraces third-party developers offering them "ungated" access to API documentation and ungated access to free software for testing • User forms – The publisher offers opportunities both online and offline for end users to collaborate and share ideas • Add-on Marketplace – The publisher offers add-on software via a sponsored/hosted marketplace, including opportunities for end-users to provide satisfaction ratings – including components to address multichannel requirements
3 – Pacing	• Partner Certifications – Publisher has a certification program with multiple levels • Developer community – The company embraces third-party developers and offers tools and resources for developers online/offline • User forms – The publisher offers opportunities both online and offline for end users to collaborate and share ideas • Add-on Marketplace – The publisher offers add-on software via a sponsored/hosted marketplace, including opportunities for end-users to provide satisfaction ratings
2 – Lagging	• Partner Certifications – Does not offer certifications for partners or assigns partner exclusive territory • Developer community – The company embraces third-party developers and offers tools and resources for developers online/offline • Offers no support for developers on-line/offline • Has no add-on marketplace
1 –Stagnated	• Partner Certifications – Does not offer certifications for partners • Limits developers, often citing "quality control" • Pay-to-play model • Offers no support for developers on-line/offline • Company directly provides all implementation and support services • Zero to few – add-ons offered

Application Programmers Interface (API): Why does it matter?

- The core of software adaptability
- Eliminate manual data entry/synchronization
- Eliminates imports/exports
- Allows for third-party apps to be connected
- Enables the Ecosystem
- Allows you to differentiate on process

API

- **The leaders:**
  - Odoo
  - Microsoft Dynamics Business Central
  - Intuit
  - Oracle
  - Xero
- **Pacing**
  - Blackbaud
- **Lagging:**
  - CDK
- **The stagnated**
  - DelTek
  - Trimble
  - QuickBooks desktop
  - Sage 100/200/300/400
  - Microsoft GP

Application Programmers Interface (API) (one or more of each of the following is true)	
Score	Evaluation Criteria
4 – Leading	• Standards-based API – JSON, REST support • API Documentation – Software publisher provides documentation for their API • Developer Support – Forums, documentation and sample code • Developer licensing – Free (or very low cost) versions available to developers
3 – Pacing	• Hybrid API – uses XML formats, but proprietary methods for linking to the software • API Documentation – Software publisher provides documentation for their API • Developer Support – Forums, documentation and sample code • Developer licensing – Free (or very low cost) versions available to developers
2 – Lagging	• Not all software features are exposed via API • Proprietary API – using proprietary format • API cannot be exposed outside client firewall • API Documentation – Software publisher provides no documentation for their API • Developer Support – Lacks Forums, documentation and sample code • Developer licensing – No option for developers to secure free (or very low cost) versions of the software
1 – Stagnated	• Has no API, integration only possible via direct-data access • Software publisher purports to have API, but limits access to “approved” partners • No public API documentation • Vendor charges for API access

The leaders take APIs seriously

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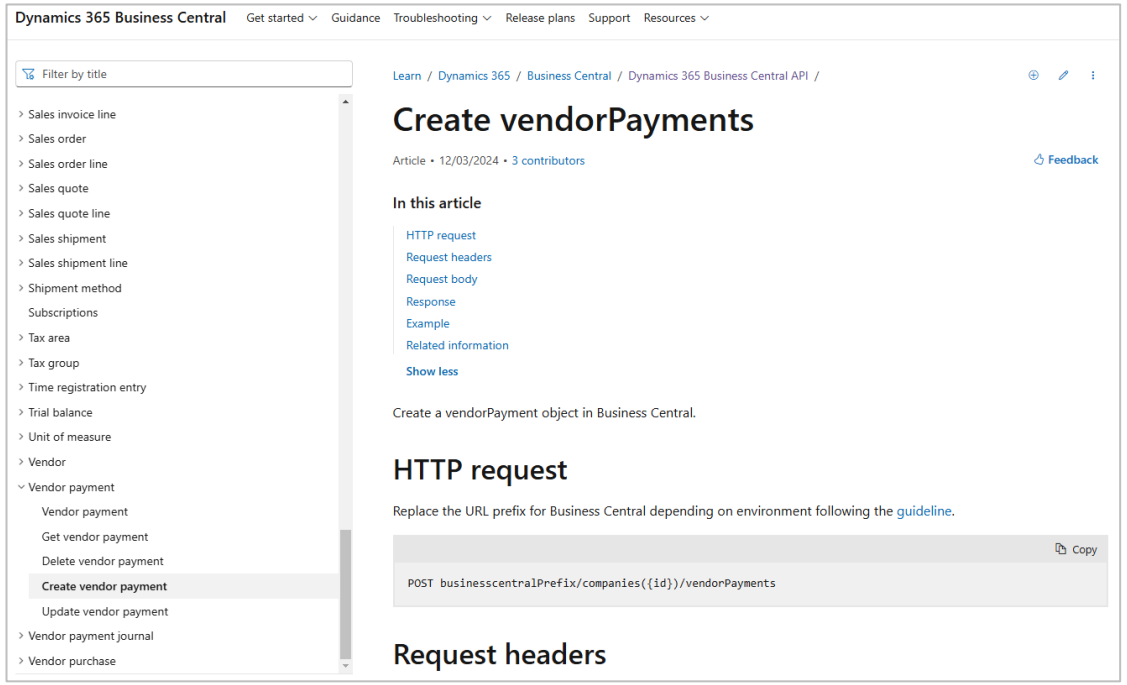
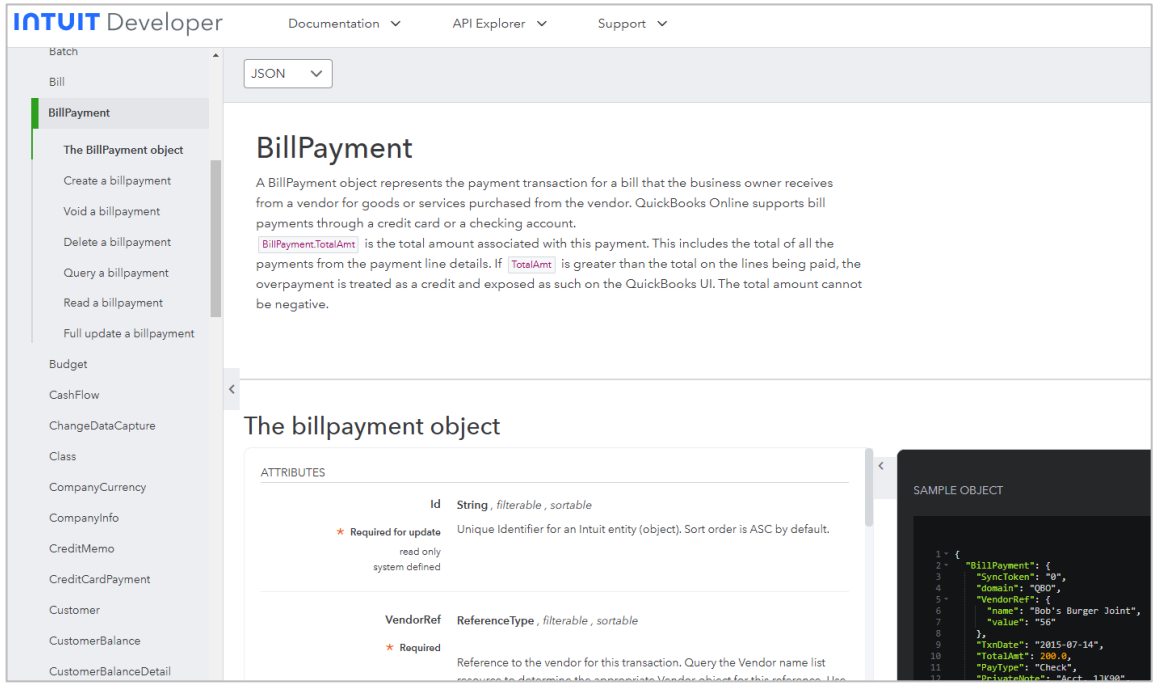
Microsoft Dynamics



QuickBooks Online



Supply Chain: Why does it matter?

Nearly all companies of all sizes do some type of B2B transactions with vendors

- The higher the volume, the larger vendor teams (AP, logistics, order management) will grow
- Connectivity to all these functions drive exponential efficiency
- Leaders across industries demonstrate supply chain proficiency

Supply Chain Integration:

- **The leaders:**
  - Odoo
  - Microsoft Dynamics Business Central
  - Intuit
  - Oracle
  - Xero
- **Pacing**
  - Blackbaud
- **Lagging:**
  - QuickBooks desktop
  - Sage 100/200/300/400
  - Microsoft GP
- **The stagnated**
  - DelTek
  - CDK
  - Trimble

Supply Chain Integration	
Score	Evaluation Criteria
4 – Leading	• Standards-based API that allows for your multichannel platform to integrate/exchange transactions in real-time • API support for supply chain transactions including vendor master data, purchase orders, receipts, invoices and payments • Support for standards-based B2B transactions (EDI)
3 – Pacing	• Standards-based or proprietary API that allows for your ERP to integrate/exchange transactions in real-time • Support for external locations • Availability of third-party B2B integration platform
2 – Lagging	• Software has standard or proprietary API that can be integrated into a single-inventory framework • No third-party B2B integration support
1 – Stagnated	• Has no API to support B2B transactions • Software publisher locks customers into their B2B network (transactions/payments) • Has no direct support for single inventory functions

Vendor Ratings

ERP Vendor Matrix

	Odoo	Microsoft Bus. Central	QuickBooks Online	Sage Intacct	DelTek	Oracle NetSuite	QuickBooks Desktop
Overall	4.0	4.0	3.9	3.5	1.1	4.0	2.5
Architecture	4.0	4.0	3.7	3.7	1.0	4.0	1.0
API	4.0	4.0	4.0	3.3	1.0	4.0	1.0
Vendors and EcoSystem	4.0	4.0	4.0	4.0	1.2	4.0	4.0
Supply Chain Management	4.0	4.0	4.0	3.2	1.0	4.0	4.0

Final takeaways: Choosing the right ERP

- **Capability vs. Adaptability** – Long-term success depends on both.
- **Beyond the Buzzwords** – True ERP value lies in integration, flexibility, and vendor ecosystem.
- **Future-Proofing Matters** – The best ERP grows with your business.
- **Scoring & Evaluation** – Use structured criteria, not just surface-level features.
- **Your ERP is a Competitive Advantage** – The right system drives revenue, not roadblocks it.

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Thank You!

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