TEMPLATE TO FILL IN

ERP System Requirements

A requirements specification describes what your ERP system must do, not how. With this structure you describe your requirements so that quotations can really be compared. Tip: short and concrete is better than long and general.

1. Company and Current Situation

Industry, size (employees, locations), what you produce or offer:

Which programs and spreadsheets do you use today, and what bothers you most about them?

2. Project Goals

Two or three measurable goals (e.g. “halve the lead time for quotations”):

3. Areas and Processes

Which areas should the system cover? (tick)

- [ ] Sales, CRM, quotations
- [ ] Purchasing and inventory
- [ ] Manufacturing and production
- [ ] Projects, timesheets, field service
- [ ] Invoicing and accounting
- [ ] Webshop, point of sale, customer portal
- [ ] HR, time off, shift planning

Describe your most important process in steps (from enquiry to payment):

4. Must, Should and Could Requirements

Must (impossible without):

Should (important, but negotiable):

Could (nice to have):

5. Data and Interfaces

Which data will be migrated (customers, products, bills of materials, open items …), and from which system?

Which systems must be connected (accountant, webshop, machines, banks …)?

6. Users, Operation and Framework

Number of users per area, mobile use (field service, warehouse), languages:

Hosting (cloud or own server), budget, desired start date, internal project lead:

How to use this template: Send it to all vendors in the same form and ask for an answer per point: covered by the standard, customisation needed, or not covered. This way you compare quotations on the same basis.

THAC GmbH · Process before software

Process consulting, Odoo ERP and AI for small and mid-sized companies.
We are happy to go through your requirements with you in the free process check.

thac.at

office@thac.at
+43 677 61972793