

# Client System Reviews



Is your system still operating at peak efficiency? As time goes on, the business grows, goals change and evolve, new products and services are added. Your software system needs to be able to adapt to those changes. That is why an annual checkup maybe necessary to help ensure your ERP software system is working well for your company.

Here are some of the areas that we explore during an annual review.

## Accounting:

- What major changes do you foresee coming in the next couple of years? What issues do you see that will have to be addressed because of those changes?
- What areas to you want to focus on improving over the next year?
- What manual processes are you doing like keying in information from a 3<sup>rd</sup> party application?
- Do you have tasks where you have duplicate data entry?
- Are you tracking your fixed assets in a spreadsheet or using an outside accountant to take care of your depreciation schedules?
  - Sales, Inventory and Distribution:
- What challenges to you have in customer service? What improvements would you like to make?
- What challenges to you have in the sales department? Are they getting the information that they need to help track their leads and profitability?
- Do you have challenges in your inventory accounting? Tracking inventory, costing the inventory, etc.
- Do you have a website that your customer's order from? Is it integrated with your ERP solution?
  - Manufacturing:
- Do you have problems with scheduling or tracking production?
- Are you able to capture all of your costs regarding production?

## System Upgrades:

We provide assistance to companies for regular maintenance level upgrades to upgrading companies running on older versions of software. Please contact us for your upgrade planning session. We will be able to assist you with determining if your company would benefit from an upgrade of your software comparing against the cost estimate for the upgrade.