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# 2026 ERP Evaluation Guide

More than 100 capabilities to weigh and compare as you choose the cloud ERP that fits how your business makes, moves, sells, and services goods.



# Finding the Right ERP for You

If you are starting to evaluate cloud ERP, you already know the drag that legacy systems put on a growing business. Choosing the right cloud ERP is about far more than replacing old software. It is the foundation for how you will plan, produce, sell, and serve customers for the next decade. The best fit is flexible enough to match the way you work today, open enough to adapt as you grow, and intelligent enough to help your teams make better decisions every day.

It is easy to get lost comparing long lists of features. Those details matter, but the bigger question is how well a system supports your business goals and where it fits in your broader strategy. The right cloud ERP connects data across your operations, gives every team a shared and trusted view of the business, and increasingly brings artificial intelligence directly into the work so your people can focus on higher value tasks.

This 2026 edition reflects where ERP is heading. Agentic AI is moving from quiet assistant to active participant, carrying out multi-step processes with the right human oversight. Platforms are becoming more composable, so you can adopt capabilities in a modular way and pivot quickly. And expectations around real-time data, supply chain resilience, sustainability, and security have all risen. We updated this guide to help you weigh these priorities alongside the core capabilities your operations depend on.



# How to Use This Guide

This guide is organized by function so you can approach ERP as a business advantage rather than a back office tool. For each capability, rate how important it is to you on a scale of one to five, then compare how each option measures up. The Rootstock column is filled in for you. The two vendor columns are left blank so you can score the other solutions you are considering. The result is not a raw feature count. It is a clear, weighted picture of which solution is strongest where it matters most to you.

As you work through the list, you will likely think of capabilities that are unique to your business. That is exactly the point. Use this as a starting framework and add the items that make it your own.



| Functional Area | Capability                                             | Importance (1 to 5) | Rootstock | Vendor 1 | Vendor 2 |
|-----------------|--------------------------------------------------------|---------------------|-----------|----------|----------|
| Sales           | Lead management                                        |                     | ✓         |          |          |
|                 | Opportunity management                                 |                     | ✓         |          |          |
|                 | Account management                                     |                     | ✓         |          |          |
|                 | Sales agreements and contracts                         |                     | ✓         |          |          |
|                 | Configure, price, and quote (CPQ)                      |                     | ✓         |          |          |
|                 | Available to promise                                   |                     | ✓         |          |          |
|                 | Margin visibility                                      |                     | ✓         |          |          |
|                 | Lead time visibility                                   |                     | ✓         |          |          |
|                 | Order production and delivery status                   |                     | ✓         |          |          |
|                 | Accounts receivable visibility                         |                     | ✓         |          |          |
|                 | AI guided selling and next best action recommendations |                     | ✓         |          |          |

| Functional Area | Capability                                                | Importance (1 to 5) | Rootstock | Vendor 1 | Vendor 2 |
|-----------------|-----------------------------------------------------------|---------------------|-----------|----------|----------|
| Sales Orders    | Estimates and quotes                                      |                     | ✓         |          |          |
|                 | Configuration management                                  |                     | ✓         |          |          |
|                 | Flexible pricing and discounting                          |                     | ✓         |          |          |
|                 | Flexible product types and services                       |                     | ✓         |          |          |
|                 | Sales tax management                                      |                     | ✓         |          |          |
|                 | Automatic creation of sales order from opportunities      |                     | ✓         |          |          |
|                 | Tag orders to projects, service contracts, and warranties |                     | ✓         |          |          |
|                 | Recurring revenue and subscription orders                 |                     | ✓         |          |          |
|                 | Omnichannel and ecommerce order capture                   |                     | ✓         |          |          |
|                 | Customer self-service ordering portal                     |                     | ✓         |          |          |



| Functional Area | Capability                                               | Importance (1 to 5) | Rootstock | Vendor 1 | Vendor 2 |
|-----------------|----------------------------------------------------------|---------------------|-----------|----------|----------|
| Engineering     | Multilevel bill of materials (BOM)                       |                     | ✓         |          |          |
|                 | Flexible routings                                        |                     | ✓         |          |          |
|                 | Multiple product costing methods                         |                     | ✓         |          |          |
|                 | Lifecycle engineering change revision and design control |                     | ✓         |          |          |
|                 | Track and trace as designed, as built, and as maintained |                     | ✓         |          |          |
|                 | Support kits, configured, and service items              |                     | ✓         |          |          |
|                 | Digital product records with CAD and PLM integration     |                     | ✓         |          |          |

| Functional Area | Capability                                                           | Importance (1 to 5) | Rootstock | Vendor 1 | Vendor 2 |
|-----------------|----------------------------------------------------------------------|---------------------|-----------|----------|----------|
| Production      | Work order management                                                |                     | ✓         |          |          |
|                 | Scheduling and capacity planning                                     |                     | ✓         |          |          |
|                 | Sales and operations planning (S&OP)                                 |                     | ✓         |          |          |
|                 | Shop floor control                                                   |                     | ✓         |          |          |
|                 | Mixed production modes                                               |                     | ✓         |          |          |
|                 | Project based production                                             |                     | ✓         |          |          |
|                 | Subcontractor management                                             |                     | ✓         |          |          |
|                 | Disassembly and rework                                               |                     | ✓         |          |          |
|                 | Quality management                                                   |                     | ✓         |          |          |
|                 | Multi-plant and multi-location                                       |                     | ✓         |          |          |
|                 | Advanced analytics for planning, capacity, and work order management |                     | ✓         |          |          |
|                 | AI-driven scheduling and bottleneck detection                        |                     | ✓         |          |          |
|                 | IoT and machine data capture for connected operations                |                     | ✓         |          |          |
|                 | Digital twin and real-time shop floor visibility                     |                     | ✓         |          |          |



| Functional Area | Capability                                             | Importance (1 to 5) | Rootstock | Vendor 1 | Vendor 2 |
|-----------------|--------------------------------------------------------|---------------------|-----------|----------|----------|
| Supply Chain    | Requisitioning                                         |                     | ✓         |          |          |
|                 | Purchase management                                    |                     | ✓         |          |          |
|                 | Materials Requirements Planning (MRP)                  |                     | ✓         |          |          |
|                 | Distribution Requirements Planning (DRP)               |                     | ✓         |          |          |
|                 | Replenishment                                          |                     | ✓         |          |          |
|                 | Supplier communities and portals                       |                     | ✓         |          |          |
|                 | Direct and indirect item and service procurement       |                     | ✓         |          |          |
|                 | Mobile requisitioning and purchasing approval workflow |                     | ✓         |          |          |
|                 | Configurable workflow approval rules and routings      |                     | ✓         |          |          |
|                 | Invoice matching                                       |                     | ✓         |          |          |
|                 | AI demand sensing and forecasting                      |                     | ✓         |          |          |
|                 | Supply chain risk monitoring and disruption alerts     |                     | ✓         |          |          |
|                 | Supplier performance tracking and scorecards           |                     | ✓         |          |          |
|                 |                                                        |                     |           |          |          |



| Functional Area | Capability                                                                                         | Importance (1 to 5) | Rootstock | Vendor 1 | Vendor 2 |
|-----------------|----------------------------------------------------------------------------------------------------|---------------------|-----------|----------|----------|
| Inventory       | Lot control                                                                                        |                     | ✓         |          |          |
|                 | Serial number tracking                                                                             |                     | ✓         |          |          |
|                 | Flexible item attributes                                                                           |                     | ✓         |          |          |
|                 | Allocate or segregate inventory to orders or projects                                              |                     | ✓         |          |          |
|                 | Cycle counting                                                                                     |                     | ✓         |          |          |
|                 | Consigned inventory                                                                                |                     | ✓         |          |          |
|                 | License plating and container tracking                                                             |                     | ✓         |          |          |
|                 | Mobile cycle counting, receiving, issuance, and transfer                                           |                     | ✓         |          |          |
|                 | Multi-warehouse                                                                                    |                     | ✓         |          |          |
|                 | Standard or weighted average cost elements such as material, labor, overhead, fringe, ODC, and SGA |                     | ✓         |          |          |
|                 | Freight and landed cost                                                                            |                     | ✓         |          |          |
|                 | Shipping and receiving                                                                             |                     | ✓         |          |          |
|                 | Inbound and outbound logistics                                                                     |                     | ✓         |          |          |
|                 | Pick, pack, and ship from mobile devices                                                           |                     | ✓         |          |          |
|                 | Barcode, RFID, and QR code scanning support                                                        |                     | ✓         |          |          |
|                 | Real-time inventory visibility across locations and channels                                       |                     | ✓         |          |          |



| Functional Area | Capability                                              | Importance (1 to 5) | Rootstock | Vendor 1 | Vendor 2 |
|-----------------|---------------------------------------------------------|---------------------|-----------|----------|----------|
| Financials      | Financial reporting                                     |                     | ✓         |          |          |
|                 | General Ledger (G/L)                                    |                     | ✓         |          |          |
|                 | Weighted average and standard costing                   |                     | ✓         |          |          |
|                 | Accounts Payable (AP)                                   |                     | ✓         |          |          |
|                 | Accounts Receivable (AR)                                |                     | ✓         |          |          |
|                 | Fixed assets                                            |                     | ✓         |          |          |
|                 | Budgeting and forecasting                               |                     | ✓         |          |          |
|                 | Recurring billing and subscriptions                     |                     | ✓         |          |          |
|                 | Cash management                                         |                     | ✓         |          |          |
|                 | Credit and collections                                  |                     | ✓         |          |          |
|                 | Drill down from balances to operational detail          |                     | ✓         |          |          |
|                 | Predictive analytics and artificial intelligence        |                     | ✓         |          |          |
|                 | Mobile device support across all financial applications |                     | ✓         |          |          |
|                 | Multicurrency                                           |                     | ✓         |          |          |
|                 | Multicompany                                            |                     | ✓         |          |          |
|                 | Multitax                                                |                     | ✓         |          |          |
|                 | Electronic invoicing and global tax compliance          |                     | ✓         |          |          |
|                 | Continuous close and automated reconciliations          |                     | ✓         |          |          |
|                 | Revenue recognition                                     |                     | ✓         |          |          |



| Functional Area  | Capability                                                                                 | Importance (1 to 5) | Rootstock | Vendor 1 | Vendor 2 |
|------------------|--------------------------------------------------------------------------------------------|---------------------|-----------|----------|----------|
| Customer Service | Return material authorizations (RMA)                                                       |                     | ✓         |          |          |
|                  | Warranties                                                                                 |                     | ✓         |          |          |
|                  | Device history                                                                             |                     | ✓         |          |          |
|                  | Entitlements                                                                               |                     | ✓         |          |          |
|                  | Contracts                                                                                  |                     | ✓         |          |          |
|                  | Case management                                                                            |                     | ✓         |          |          |
|                  | Field service management                                                                   |                     | ✓         |          |          |
|                  | Customer communities and self-service portals                                              |                     | ✓         |          |          |
|                  | 360-degree view of customer orders, shipments, invoices, payments, and credits             |                     | ✓         |          |          |
|                  | Complete view of ERP and CRM activity including inventory, production, and shipment status |                     | ✓         |          |          |
|                  | Advanced shipment replacements                                                             |                     | ✓         |          |          |
|                  | Lifetime traceability of field assets                                                      |                     | ✓         |          |          |
|                  | Service technician inventory                                                               |                     | ✓         |          |          |
|                  | AI case deflection and virtual agents                                                      |                     | ✓         |          |          |
|                  | Predictive and preventive service                                                          |                     | ✓         |          |          |



| Functional Area   | Capability                                                                         | Importance (1 to 5) | Rootstock | Vendor 1 | Vendor 2 |
|-------------------|------------------------------------------------------------------------------------|---------------------|-----------|----------|----------|
| AI and Automation | Embedded AI copilot with natural language interaction                              |                     | ✓         |          |          |
|                   | Agentic AI that executes multi-step workflows with human oversight                 |                     | ✓         |          |          |
|                   | Specialized AI agents for finance, procurement, inventory, production, and service |                     | ✓         |          |          |
|                   | Human-in-the-loop controls, guardrails, and approvals                              |                     | ✓         |          |          |
|                   | AI generated insights and recommended actions                                      |                     | ✓         |          |          |
|                   | Predictive and prescriptive analytics across the business                          |                     | ✓         |          |          |
|                   | Anomaly and exception detection                                                    |                     | ✓         |          |          |
|                   | Intelligent document capture and data extraction                                   |                     | ✓         |          |          |
|                   | Natural language reporting and search                                              |                     | ✓         |          |          |
|                   | AI audit trail, transparency, and explainability                                   |                     | ✓         |          |          |
|                   | Configurable, no-code automation and business rules                                |                     | ✓         |          |          |



| Functional Area | Capability                                                           | Importance (1 to 5) | Rootstock | Vendor 1 | Vendor 2 |
|-----------------|----------------------------------------------------------------------|---------------------|-----------|----------|----------|
| Cloud Platform  | 100% true cloud solution, not hosted                                 |                     | ✓         |          |          |
|                 | Multitenant with automatic upgrades                                  |                     | ✓         |          |          |
|                 | No version lock                                                      |                     | ✓         |          |          |
|                 | Composable, modular architecture                                     |                     | ✓         |          |          |
|                 | Low-code environment to empower business users                       |                     | ✓         |          |          |
|                 | User definable reports                                               |                     | ✓         |          |          |
|                 | User definable page layouts                                          |                     | ✓         |          |          |
|                 | User definable dashboards                                            |                     | ✓         |          |          |
|                 | Visual workflow builder using clicks not code                        |                     | ✓         |          |          |
|                 | Single data model for ERP, CRM, and your custom apps                 |                     | ✓         |          |          |
|                 | Common toolsets and system administration across ERP and CRM         |                     | ✓         |          |          |
|                 | Embedded collaboration and enterprise social                         |                     | ✓         |          |          |
|                 | Responsive design with mobile support across all functions           |                     | ✓         |          |          |
|                 | Low-code mobile application builder                                  |                     | ✓         |          |          |
|                 | Low-code supplier community builder                                  |                     | ✓         |          |          |
|                 | Low-code customer community builder                                  |                     | ✓         |          |          |
|                 | Large third-party application marketplace                            |                     | ✓         |          |          |
|                 | Ease of integration with APIs and web services                       |                     | ✓         |          |          |
|                 | Event-driven integration and real-time data sync                     |                     | ✓         |          |          |
|                 | Third-party security and control certifications                      |                     | ✓         |          |          |
|                 | Single point of user administration across ERP and CRM               |                     | ✓         |          |          |
|                 | Enterprise-grade security, encryption, and threat monitoring         |                     | ✓         |          |          |
|                 | Online customer and training community                               |                     | ✓         |          |          |
|                 | Large ecosystem of third-party trainers, consultants, and developers |                     | ✓         |          |          |



| Functional Area       | Capability | Importance (1 to 5) | Rootstock | Vendor 1 | Vendor 2 |
|-----------------------|------------|---------------------|-----------|----------|----------|
| Personal Requirements |            |                     |           |          |          |
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# About Rootstock

Rootstock Software® is a worldwide provider of cloud ERP on the Salesforce Platform. When combined with Salesforce CRM, Rootstock Cloud ERP gives manufacturing, distribution, and supply chain organizations a single platform to plan, produce, sell, and service goods — and to grow and manage their businesses with confidence.



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