

INDIVIDUAL SCORE SHEET :Dave

SCORING:

- 3 Meets or exceeds
- 2 Mostly meets
- 1 Meets some
- 0 Does not meet

ITEM SCORE

Vantage Point	INFOR	Exact Macola	NetSuite
Vantage Point	Acumen Group	Attivo Consulting	Aminian

TECHNICAL					
1	Applicability of ERP to the Apparel & Textile industry vertical:	3	3	3	3
2	Provider's industry specific reference accounts:	3	3	3	3
3	Provider's On-Premise/Hosted/Cloud capabilities:	2	2	2	2
4	Provider's ability to support LAN/WAN (to China & 'road warriors') networks:	1	3	3	3
5	Provider's ability to provide comprehensive support migration from Fishbowl (FB) & QuickBooks (QB) systems:	2	2	2	3
6	Granularity of ERP's security profiles for user access to functions and data:	2	3	3	3
7	Ability to configure user interfaces (UI) according to roles	1	2	3	3
8	Provider's capacity to provide hardware and software (OS & database) maintenance services:	3	3	3	3
9	Providers ability to provide ongoing ERP maintenance/upgrade services:	3	3	3	3
10	Providers ability to monitor, manage, and adjust the capacity of the IT platform:	3	1	2	3
11	Provider's ability to provide high availability (HA) and disaster recovery (DR) resources & services, with annual testing:	2	2	2	3
12	Provider's ability to provide tools and services for ERP custom report creation & maintenance:	3	2	2	3
13	Provider's ability to accommodate both Window's & Mac users:	2	3	3	3
14	Providers ability to perform a comprehensive Business Process Analysis (BPA) as a precursor to implementation:	3	2	2	1
15	Provider's ability to plan and execute a comprehensive system and ERP user training program:	2	3	3	2
16	Provider's pilot testing methodology and services:	3	3	3	3
17	Provider's proposed 'Go-Live' support & services:	3	2	2	3
18	Provider's post 'Go-Live' services:	3	1	2	3

0 Does not meet

ITEM SCORE

Vantage Point	INFOR	Exact	NetSuite
Vantage Point	Acumen Group	Macola Attivo Consulting	Arminian

Functional Area	Feature	Special requirements/comments					
<b>Customer Service</b>							
19	Customer Master	Must be migrated from Fishbowl (FB)/Quickbooks(QB)	3	3	3	3	
20	Sales Rep Master	Preferably migrated from FB/QB, with cross references to Customers; incl. features that support independent sales reps	2	3	3	3	
21	Cust. Requirements Repository	Viewable by all functions within PCTG; should also include typical/default shipping instructions	2	3	3	3	
22	CRM	Lesser importance, but need greater support for integration of key customer information and preferences	1	3	3	3	
23	Cust. web portal	Low priority - future project	2	3	3	3	
<b>Order Processing</b>							
24	Order Entry	Preferably with integration to PCTG email (Outlook), third-party logistics provider (3PL), and inventory management modules	2	3	3	3	
25	Product Pricing Flexibility	Require multiple sets of price brackets, per customer depending on the nature of specific orders	3	3	3	3	
26	Allocated item reassignment	Ability to 'sell'/reallocate already allocated inventory during the ordering process	2	3	3	3	
27	Batch/Lot Specification	Required for fabric roll selection (length)	3	3	3	3	
28	Credit approval workflow	Desirable	3	3	3	3	
29	Dimensions	Weight required for shipping purposes	3	3	3	3	
30	Customer Deposits	Infrequent	3	3	3	3	
31	Pro-Forma Invoices	For shipments to China	3	3	3	3	
32	Commissions Payments	Based on invoice; at least four brackets required; should be easy to customize & manage	3	3	3	3	
33	Independent Sales Rep. web portal	Allow Ind. Reps to initiate new customer set-up; provide limited view of order status, and to access relevant reports	2	3	2	3	
34	Open order migration	Comprehensive support needed to migrate open orders	2	3	3	3	
35	Order history migration	Comprehensive support needed to migrate customer order history	2	2	2	2	
<b>Inventory Management</b>							
36	Item Master	Must be migrated from Fishbowl (FB)/Quickbooks(QB); must include inventory & non-inventory (direct ship) items	3	3	3	3	
37	Multi warehouse	Currently 2, but more warehouses expected in future	3	3	3	3	
38	Consignment inventory tracking	Required	3	3	3	3	
39	'In-transit' inventory tracking	Ability for remote users & suppliers to view and modify 'in-transit' status, preferably via web portal, is required	2	2	3	3	
40	Batch/Lot/Bin Control	Required, in order to specify discrete fabric rolls, by length, when receiving, picking, and shipping. Software should be able to assign/track a serial number for each roll, which can act as the unique identifier for each roll. (Reference Receiver Document in Appendix A)	3	3	3	3	
41	Inventory Aging Control (FIFO)	Required, due to limited 'shelf-life' of specific patterns & colors (FIFO should be the default selection, but order entry person should be able to select specific rolls based on length)	3	3	3	3	

0 Does not meet

42		Cut Yardage	Required, ability to handle cutting of rolls - e.g. a 60 yd. roll might be cut multiple times for samples, or for half-roll requirement. System must be able split rolls, shipping the "new" roll, and put the remaining roll into stock. This feature will be especially critical in the new business division, which appears to require a lot of sample yardage.	3	3	3	3
43		Item balances migration	Comprehensive support needed to migrate item balances (on hand, on order, in transit, allocated)	3	3	3	3
44		Item sale history, lead time, & order pt. migration	Comprehensive support needed to migrate items' sales histories, lead times, and order points	3	3	3	3
45		X-ref to designs & samples	Desirable	2	3	3	3
<b>Distribution Logistics</b>							
46		Shipping application	Required, integration with third-party logistics provider (3PL) Interoperability with SPS Commerce (EDI service) desired (low priority); Currently using 856 ASN transaction set for 10 -20 orders per month.	2	3	3	3
47		Vendor WIP tracking	Required, ability to track/monitor progress of PO's at vendors through their production processes to replace the current OOR report. PO status should be updated by vendors and/or PCTG staff in China	1	3	3	3
<b>Procurement</b>							
48		Vendor Master	Must be migrated from Fishbowl (FB)/Quickbooks(QB); currently about 10 suppliers.	2	3	3	3
49		PO creation, tracking & receiving	Required, including PO's for specific projects.	3	3	3	3
50		Landed cost tracking	Required	3	3	3	3
51		Procurement forecasting	Need to forecast based on 3 & 6 months sales histories report.	3	3	3	3
52		Vendor Performance Evaluation	Required, must include production times (promie vs. actual), delivery reliability and quality management tracking features	3	3	3	3
53		PO approval wrkflow	Desirable	3	3	3	3
54		Open PO migration	Comprehensive support needed to migrate open PO's	3	3	3	3
55		PO history migration	Comprehensive support needed to migrate vendor order history	2	2	2	2
<b>Accounting &amp; Finance</b>							
56		<b>Credit &amp; Collections</b>	Standard credit functions Tools to systemize collections such as place accounts on <b>Watch</b> (notify Credit Mgr. if order placed), or on <b>Hold (whereby order flows to Credit for release)</b> . Tools to assist in documenting [Credit screening] new accounts.	3	3	3	3
57		<b>AR</b>	Open item receivables tracking	Required	3	3	3
58			Credit card payment processing	Required	3	3	3
59			AR aging report	Required	3	3	3
60			Open AR item migration	Comprehensive support needed to migrate open AR items	3	3	3
61		<b>AP</b>	Accounts Payable tracking	Required	3	3	3
62			Vendor prepayment	Required, infrequently	3	3	3
63			Electronic Funds Transfer (EFT)	Interoperability with banks web site, desirable	3	3	3
64			Open AP item migration	Comprehensive support needed to migrate open AP items	3	3	3
65		<b>GL</b>	Tight integration within ERP	Required; fiscal year matches calendar year; PCTG uses 12 accounting periods	3	3	3
66			GL Chart of Accounts and balances migration	Comprehensive support needed to migrate/set-up GL Chart of Accounts, account balances, and interfaces to AR, AP, and FA	3	3	3
67		<b>Cash Mgt.</b>	Cash balance, transfers, & bank reconciliation	Required	3	3	3
68		<b>FA</b>	Fixed Assets with depreciation	Required ( <b>now optional?</b> )	0	0	0
69			Fixed Assets migration with depreciation balances	Comprehensive support needed to migrate FA ledger and depreciation balances ( <b>now optional?</b> )	0	0	0
<b>Customizable Reporting</b>							
70			Std. & customizable reports	Required for Cust. Svc., Order Processing, Sales Analysis, Inventory Mgt., Distribution Logistics, Procurement & Finance	3	3	3
71			Export reports to Excel & PDF	Required	3	3	3

0 Does not meet

Design & Sample Management							
72		Document Management with metadata search capabilities	Customizable method to store PCTG’s Fabric Detail Sheets with x-ref to item master (SKU’s)	0	2	3	3
TOTAL - TECHNICAL				180	195	196	207
SCORE - TECHNICAL				83.3%	90.3%	90.7%	95.8%

COST							
1	Transition						
2	Infrastructure						
3	Software Licence						
4	Software Maintenance						
5	Any Ancillary						
6	Client Support Center						
7	3 Year Total						
8	Service Cost Flexibility						
TOTAL - COST				0	0	0	0
SCORE - COST				0.0%	0.0%	0.0%	0.0%

0 Does not meet

CONTRACT TERMS					
1	Duration of initial term				
2	Options for renewal of contract				
3	Cost to get out of contract				
4	Exclusions, restrictions				
5	Ability to complete contract by 7/6/15				
6	Ability to complete implementation by xx/xx/xx				
TOTAL - CONTRACT TERMS		0	0	0	0
SCORE - CONTRACT TERMS		0.0%	0.0%	0.0%	0.0%
OTHER					
1	Experience providing this type of service	3	3	3	3
2	References	3	3	3	2
3	Responsiveness to PCTG's requirements	3	3	3	3
4	Company stability	3	3	3	3
5	Availability of local support	3	3	3	3
TOTAL - OTHER		15	15	15	14
SCORE - OTHER		100.0%	100.0%	100.0%	93.3%