ERP HEADtoHEAD™ Demonstration Scripts, 2024

1. Production

1.1 Brief Introduction to the ERP Product and Vendor

Provide a brief introduction to the ERP product and the vendor, covering:

- The ERP software author
- The software partner/reseller (if relevant)
- The names and versions of the software products being demonstrated today (including 3rd party software if relevant)
- Any unique selling points for your system which are of relevance to manufacturers

1.2 Planning, Scheduling and Production Orders

Provide a brief overview of the functionality available to assist with production planning and scheduling. Your demonstration should address such topics as:

- A sample demand plan, made up of forecast and customer orders
- A typical workbench for a production planner showing the output from Material Requirements Planning (MRP)
- Options to aid scheduling of production, taking into account available capacity
- Conversion of a planned order to a production order
- Completion of a production order on the shop floor

1.3 Product Costing

Provide an overview of the functionality provided as standard by your system to manage standard costs for manufactured products, showing:

- Cost rollups for a multi-level bill of materials
- How the system handles costs under various cost elements/components (e.g., materials, labour, overheads).

Demonstrate how the system supports reporting on actual material usage versus standards.

1.4 Overflow time/Questions

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2. Procurement

2.1 Brief Introduction to the ERP Product and Vendor

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- The ERP software author
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- The names and versions of the software products being demonstrated today (including 3rd party software if relevant)
- Any unique selling points for your system relating to procurement processes

2.2 Supplier Quotation Management

Please provide an overview of the functionality provided by your system to help businesses manage supplier quotations, including:

- management of an RFQ process
- recording interactions with vendors
- storing documentation received from vendors

2.3 Purchasing Approval Process

Please provide an overview demonstration of the options provided by your system to manage purchase approval at the various stages from purchase requisition or order through to payment approval. Highlight variations that might apply to services or non-inventory purchases compared to inventory items with goods receipt processes.

2.4 Supplier Relationship Management

Please provide an overview demonstration of functions and analytics in the system that can be used to support Supplier Relationship Management processes such as:

- Supplier performance analysis
- Supplier audit management
- Maintenance of supplier accreditation and certification records

2.5 Overflow time/Questions

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3. Finance

3.1 Brief Introduction to the ERP Product and Vendor

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- The ERP software author
- The software partner/reseller (if relevant)
- The names and versions of the software products being demonstrated today (including 3rd party software if relevant)
- Any unique selling points for your system relating to finance processes

3.2 Financial & Management Reporting

Your demonstration should address such topics as:

- Demonstrate how the structure of the Chart of Accounts is defined in your system.
- Demonstrate any additional functionality provided as standard by your system to facilitate the analysis of financial transactions through additional categories, tags or dimensions separate to the regular chart of accounts structure setup.
- Show how a user would use the financial reporting tools provided by the system to analyse financial data.
- Demonstrate how a user can drill through from a P&L report into the details of the source transactions
- Show some examples of other financial reports generated using your preferred financial reporting tool

3.3 Cash Flow Forecasting

Please provide an overview of how your system supports cash flow forecasting.

3.4 Overflow time/Questions

4. Sales (1) - High volume sales order processing; complex sales pricing and discounts

4.1 Brief Introduction to the ERP Product and Vendor

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- The names and versions of the software products being demonstrated today (including 3rd party software if relevant)
- Any unique selling points for your system relating to sales processes

4.2 Sales Order Processing

Please provide an overview of the Sales Order Processing functionality provided by your system. Your demonstration should address such topics as:

- Show how orders can be easily and quickly entered in a high-volume or telesales type environment.
- Highlight any data pre-population rules that can apply and what key pricing information is available to the user.
- Highlight any key features that can enable users to easily view recent sales to the customer, active promotions or any other information that can enable them to suggest up-selling or cross-selling opportunities.
- Show how a user can record any specific delivery or handling requests that can be made available to fulfilment or logistics teams.

4.3 Sales Pricing and Rebates

Provide an overview demonstration of the flexibility of pricing functionality in your solution. This could cover any of the following that are available:

- Customer-specific pricing.
- On-invoice sales pricing such as multi-buy and cross-product discounting and volume-based or value-based price breaks
- Rebate-based discounting.
- Service pricing such as subscription or term and renewal-based pricing with introductory discounting.
- Any other key pricing features in your solution.

4.4 Overflow time/Questions

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5. Sales (2) - Sales quotation management; product configuration

5.1 Brief Introduction to the ERP Product and Vendor

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- The names and versions of the software products being demonstrated today (including 3rd party software if relevant)
- Any unique selling points for your system relating to sales processes

5.2 Sales Quotation Management

Provide an overview of the functionality provided by your system to support the generation of sales quotations, such as:

- Entering a sales quotation
- Creating a new revision of a sales quotation
- Converting a sales quotation into a sales order

5.3 Sales Product Configuration

Provide an overview of the functionality provided by your system to support businesses selling or manufacturing products with multiple configurable options.

5.4 Overflow time/Questions

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6. Human Resource Management

6.1 Brief Introduction to the ERP Product and Vendor

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- The software partner/reseller (if relevant)
- The names and versions of the software products being demonstrated today (including 3rd party software if relevant)
- Any unique selling points for your system relating to HR processes

6.2 Employee & Manager Self-Service

A key aspect of any modern HR system is the usability of employee and manager self-service tools. Please provide an overview of the functionality provided as standard by your system, showing:

- How an employee can log-in and perform tasks such as:
  - view/amend their personal details
  - view their current holiday balance and book time-off
  - access their payslips and view their benefits package
  - request and book training
- How a manager can have an overview of all their direct reports, including:
  - approving holiday or logging absence
  - managing annual appraisals

6.3 Employee Performance Management

Provide an overview of the functionality available to assist with managing employee performance, covering such areas as:

- Setting goals and objectives
- Performance monitoring and measurement
- Periodic performance appraisals
- Development planning (training, career progression)
- Recognition and rewards

6.4 Overflow time/Questions

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7. Projects

7.1 Brief Introduction to the ERP Product and Vendor

Provide a brief introduction to the ERP product and the vendor, covering:

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- The software partner/reseller (if relevant)
- The names and versions of the software products being demonstrated today (including 3rd party software if relevant)
- Any unique selling points for your system which are of relevance to project-based organisations

7.2 Project Planning

Provide a brief overview of the functionality available to assist with project planning and scheduling. Your demonstration should address such topics as:

- How a project is set-up in the system and how this is linked to the financial ledgers to ensure seamless financial reporting
- How a budget is assigned to a project, how this can be broken down to sub-projects (if required), and how this can then be used in a purchase order approval process
- How milestones can be assigned to the project and how these could be used as stage gates for both approval and billing
- How resources can be assigned to projects, ensuring that utilisation can be optimised

7.3 Project Costing, Billing and Reporting

A key aspect of any project is understanding the costs and revenue versus budget. Please provide an overview of the functionality provided as standard by your system to capture project costs and enable project billing and reporting, showing:

- How time and expenses can be captured against the project using a mobile device
- How costs of goods and services are assigned to the project
- How the system supports periodic billing of the customer
- The project dashboards available to monitor and report project performance against budgets or milestones for a project or program of work

7.4 Overflow time/Questions

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8. Supply Chain Planning

8.1 Brief Introduction to the ERP Product and Vendor

Provide a brief introduction to the ERP product and the vendor, covering:

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- The software partner/reseller (if relevant)
- The names and versions of the software products being demonstrated today (including 3rd party software if relevant)
- Any unique selling points for your system relating to supply chain planning.

8.2 Supply Chain Planning

Provide an overview of the functionality available to assist with supply chain planning.

Your demonstration should address such topics as:

- Tools and functions available in the system to support supply chain planning - for example:
    - Generating or loading demand plans
    - Generating or loading supply plans
    - Master Production Scheduling and Rough-Cut Capacity Planning
    - Materials Requirements Planning
    - Distribution Requirements Planning
- How these and other tools can be used to support such processes as Sales & Operations Planning (S&OP).
- Highlight any value-adding functionality such as predictive analytics and artificial intelligence that can be used to support scenario-based modelling and what-if analysis in support of supply chain planning processes.

8.3 Overflow time/Questions

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9.   Business Intelligence & Analytics

9.1   Brief Introduction to the ERP Product and Vendor

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- The software partner/reseller (if relevant)
- The names and versions of the software products being demonstrated today (including 3rd party software if relevant)
- Any unique selling points for your system relating to Business Intelligence and Analytics

9.2   Business Intelligence & Analytics for ERP users

Provide an overview of the BI & Analytics tools available as standard either as part of or in addition to your ERP system. Your demonstration should address such topics as:

- Role-based BI: How the system can support "hands-on" ERP users by providing them with the information they need to do their jobs
- Collaboration tools: How your system can support multiple users in sharing their data analysis and insights
- Dashboards:
  - For "hands on users"
  - For managers
- Data analysis:
  - Exploring large data volumes
  - Working with data from various sources

9.3   Advanced Analytics

Highlight any advanced functionality such as predictive analytics and artificial intelligence that can be used to support scenario-based modelling and what-if analysis.

9.4   Overflow time/Questions

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10. ESG and Sustainability

10.1 Brief Introduction to the ERP Product and Vendor

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- The names and versions of the software products being demonstrated today (including 3rd party software if relevant)

10.2 ESG and Sustainability Solution Overview

1. Please provide an overview of how your solutions can be used to support and manage ESG and sustainability programs.
2. Explain how your ESG and sustainability solutions link with core ERP transactional modules.
3. Demonstrate how an organisation:
   o can define ESG and sustainability metrics and targets
   o can track and analyse performance against ESG and sustainability targets

10.3 Environmental Sustainability

Demonstrate some specific examples under the following headings showing how your solution can help organisations to gather and report on data to meet the demands of legislation, customers and regulators:

- Carbon Footprint Management (e.g., tracking direct emissions; tracking indirect emissions; tracking energy usage)
- Waste Management (e.g., waste monitoring; reporting on use of plastics; using returnable packaging)
- Supply Chain Transparency (e.g., assessing and monitoring supplier sustainability; ethical sourcing)

10.4 Overflow time/Questions

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