



# HOW TO CHOOSE **THE RIGHT ERP** FOR YOUR BUSINESS

## **A GUIDE**

to selecting and implementing an ERP  
system

# Introduction

In this guide, we'll walk you through **evaluating and choosing an ERP.**

Enterprise Resource Planning (ERP) systems are becoming more popular among businesses of all sizes. ERPs help companies track and organize data, so they can remain competitive as automation

becomes a strategic priority. Incorporating an ERP at your company can change its future. In this guide, we'll walk you through the process of evaluating and choosing an ERP system.



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## WE WILL DISCUSS:

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- The features that you should consider
- How it can affect your organization's performance
- The different software options available
- How to find the best vendor for your needs



# 01 ERP FAQs

*ERPs can help companies managing their operations by tracking resources, and automating back-office functions.*

## What is ERP?

Enterprise Resource Planning (ERP) is business management software that helps companies manage their operations.

This includes tracking resources like cash and raw materials, as well as business commitments like orders and production

schedules. ERP systems also automate many back-office functions related to technology, services, and human resources.

The first ERP systems arrived in the 1970s, but they really took off in the 1990s, when businesses struggled to keep up with the demands of globalization. Companies became more complex with multiple locations and supply chains around the world, and ERP was a way to bring these systems under one roof.

Today, businesses of all sizes in every industry use ERP. The software can do everything from managing finances and tracking inventory levels to handling orders and producing invoices. It can also help manage workforces, track employee hours and absences, and process payroll.

Gartner's ['Top Strategic Technology Trends for 2022'](#) say automation

solutions are key for reliable and sustainable business growth, since they provide the technological capabilities needed to compete in a digital world.

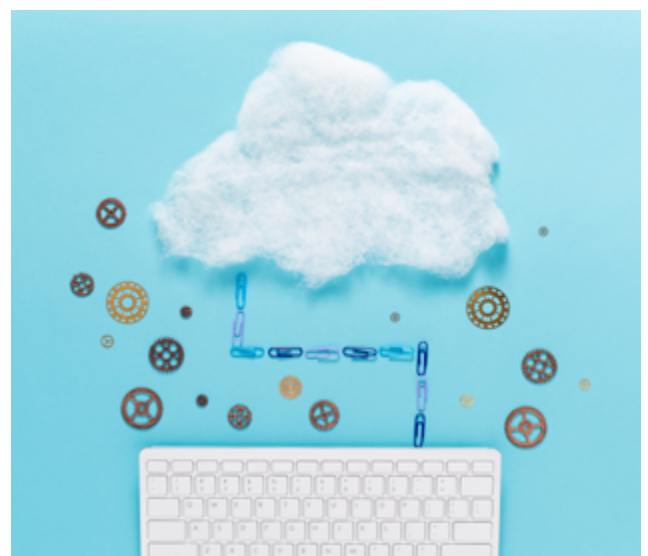
### What kind of deployment is best for my company?

There are three types of ERP deployments: on-premises, cloud-based, and hybrid. Each type has pros and cons that businesses should evaluate before deciding. Here is an overview of each deployment type:

- **Cloud-based solutions:** Cloud-based hosting offers a cost-effective and efficient solution for companies to scale up or down according to their usage pattern. There are no capital expenses, and data can be backed up and accessed at any time. Cloud servers provide solutions without straining IT resources, while also allowing companies to control how subscriptions length so they never overpay.
- **On-premises solutions:** On-premise software is licensed, so you don't need to purchase another license to add a user or connect a device with your server. This setup protects against hacking

issues, because the entire instance resides on the company's premises. However, this comes at a cost, partly because managing and maintaining these servers requires more resources than cloud infrastructure. This includes the cost of servers and networking equipment (SME), software licensing costs, integration, and IT employees.

- **Hybrid solutions:** A hybrid ERP system combines cloud and on-premise systems. With hybrid solutions, organizations can operate critical business applications with in-house servers, while managing data in other locations with hosted software that is public or private. This is ideal for companies who want to add applications and mobility while maintaining privacy.

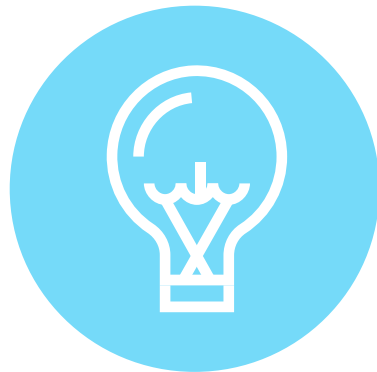


## How long does it take to implement an ERP system?

Implementing an enterprise resource planning system usually takes 1-3 years, depending on how many people need access, and which features are applied.

For example, if you only want basic inventory tracking without customer management, you might need a full ERP implementation.

You must also factor in how long it takes to train employees on using the software, as well as setting up your company's network infrastructure to work with it.



*Implementing an ERP system can take an average of 1-3 years, depending on how many people need access to the data and which features they deem most important.*



## How much does it cost to implement an ERP system?

The cost of implementing an ERP depends on the software provider, and how much they charge for each feature. There are many generic and open source solutions on the market, but it's often better to use a custom ERP system designed specifically for your company.

Since every ERP implementation project is different, we've listed some of the most important factors that can affect the cost:

- **Your business needs.** Business needs are the number one factor that determines how much an ERP will cost. This includes how many users will need access, and how much the system will contribute to your daily operations.

If you need a basic ERP solution for simple tasks like payroll or inventory management, the implementation price won't be very high.

On the other hand, an ERP system that handles tasks like human resources and customer relationship management will have complex features that raise final cost.

- **The number of modules.** While ERP solutions are generally made of several modules, you probably won't use all of them. Instead, you should choose only the ERP modules that meet your business needs to save on cost.
- **The customization required.** A custom ERP system is usually more expensive than a generic or pre-packaged ERP solution. The development team will spend more time and effort on a custom ERP implementation designed specifically for your company, increasing its cost.
- **The size of your company.** You can also save money implementing an ERP by choosing a package designed for small businesses. A small business with only a few employees probably won't need an ERP system that handles multiple users at once or uses advanced features like payroll management.
- **The geographical location of your company.** The cost of ERP implementation is higher in a developed country than a developing country.

ERP Implementation costs vary widely, so it's important to consider these factors when you evaluate your budget.

Remember that systems require more customization than others, which can drive up costs. Also bear in mind that ERP vendors will offer different levels of and support.

## How to budget for ERP implementation?

To make sure your ERP system is implemented on time and under budget, it's important to plan ahead.

To save money on your implementation project, we recommend using cloud-based software instead of an on-premise solution, which is an effective option for businesses of all sizes. Here are three ways that a cloud-based option can help you save money:

- Since the software runs in the cloud, you don't have to maintain server hardware or deal with power outages. Also, you can upgrade your system at any time without paying for new licenses or hardware.
- Cloud-based solutions are often less expensive than on-premise systems, because you only pay for the features you need instead of license fees or maintenance costs.
- Cloud-based systems are easier to set up. They don't require IT staff since everything is set up to work when it is delivered.

We also recommend you consider working with a **nearshore company**.

Choosing the best ERP system for your business depends on the size of your company, its industry, and the needs of your business. Before you can choose an ERP, however, you need to understand your own requirements.







## What is nearshoring?

Nearshoring is the same as outsourcing work to a company in a different country, except that country is closeby instead of overseas.

Many businesses turn to nearshoring companies for ERP implementation because they make the process easier and more cost-effective without the logistical downsides. This can be helpful for several reasons:

- **Cost savings:** By working with a nearshore company, you can save up to 40% on labor.
- **Cultural and time zone similarities:** Because the company is close, you are more likely to have similar cultures and time zones. This helps with communicating ideas and expectations between your respective teams.
- **Proximity:** Close proximity makes it easier for the nearshored operation to visit, which helps build trust, strengthen relationships, and foster understanding.

# 02 Gathering Your Requirements



*When looking for an ERP system, the first step is determining what you need from it. Be specific and detailed so there's no room for confusion.*

To find an effective ERP system, the first step is to determine what your company needs from it, which starts with a detailed list of requirements. Be specific enough that there's no room for confusion or interpretation.

For example, saying "I need a program that processes payroll accurately every month that automatically withdraws deductions" is more likely to provide the solution you need instead of just saying 'payroll'.

You also want to consider both functional and non-functional requirements.

**Functional requirements** describe the systems and processes your business needs to function. For example, if you're managing inventory by identifying which items are sold or returned back into stock, inventory becomes a functional requirement. Other examples include:

- The ability to process customer orders
- The ability to integrate with an accounting system
- The ability to track inventory

**Non-functional requirements** are about performance and usability; they describe the qualities of a system.

For example, a company that has multiple locations around the world might want their

# “Once you have a clear picture of your priorities – that is your values, goals and high leverage activities, organize around them”

—Stephen Covey

ERP software to be accessible at any time or place to keep track of each office. They'll want to make sure that these are taken into account when selecting an ERP.

Here are some examples of non functional requirements:

- The ability to generate reports that can be exported as an Excel file
- Compliance with Health Insurance Portability and Accountability Act (HIPAA) regulations for the medical industry
- Ease of use, so employees avoid frustrations during implementation

You should also survey your stakeholders, and even check in with people who are not directly involved with the day-to-day operations.

They can help identify any problems like documentation or legal issues before they lead to bigger complications.

The following recommendations could help you narrow down potential ERP development companies:

- Think about why you are considering ERP software. E.g. Keep up with demand to satisfy more clients by improving delivery times.
- Define how you want to achieve your goal with an ERP system. I.e. Improve inventory management by streamlining processes to speed up the service.
- Write a list of requirements for each department in your company. For example, A warehouse manager may want a system to keep track of goods in inventory while production needs “production capacity planning tools”.
- Sort the requirements into two categories: functional requirements (tracking inventory levels), and non-functional requirements (make the information available anytime, from any device).

# 03 Defining Your Objectives

*Having clear KPIs will help you measure if your goals have been reached.*

To be successful with ERP, it's important you identify business objectives and set achievable goals. This will require understanding key performance indicators (KPI) that help measure if goals are reached.

A KPI, or Key Performance Indicator, is a metric used to measure progress towards a specific goal. They are often financial in nature, such as profitability or productivity. But they can also be non-financial indicators, such as customer satisfaction or employee turnover.

For example, a KPI for a business might be to increase sales by 10% within the next quarter. By tracking KPIs, we can see how well we are doing and make necessary adjustments to our plans.



Without them, it would be very difficult to gauge our progress and identify areas for improvement. Here's some advice on how to set achievable and measurable targets:

- Identify which areas of the business need improvement. This is done by assessing which processes are causing bottlenecks, redundancies, or inefficiencies.
- Define which goals you want to achieve with ERP. Do you want to improve your customer service? Increase efficiency and productivity? Reduce inventory costs?
- Define who should be impacted by the results. It might seem like everyone in the company is involved but this isn't always true. For example, if you're

looking to improve customer service, measure the number of tickets opened and closed each day, week, or month. This identifies how efficiently your team resolves customer inquiries.

- Determine which metrics give an accurate measure of success. This is done by brainstorming which KPIs are needed to track progress and determine whether the goals have been met.
- Make sure the objectives are SMART: Specific, Measurable, Achievable, Relevant, and Time-bound.

Another tip to help you defining your objectives is making a list of your business priorities and then rank them from the most important to the least, and keep the top 3 in mind as you look for ERP options.

Here's an example of a typical checklist you could use to define your top priorities. You can make a modified version of the checklist below so that it represents the values you find most important.

- Manage purchases, orders, invoices, and reports
- Maintain inventory so that it is always updated and accurate
- Optimize accounting processes to make invoicing faster

- Consolidate and integrate all current tools into one platform
- Speed up the hiring processes to onboard ideal candidates
- Streamline all documentation so it is accessible remotely or permission-based
- Keep track of employee performance and task progress
- Improve scheduling and shipping processes to improve delivery times
- Control every detail of product manufacturing for quality assurance
- Visualize all relevant KPIs of company processes in real-time dashboards and reports
- Up-to-date maintenance information and regulations
- Tool or virtual assistant that organizes meetings and answers emails
- Streamline purchasing processes

If you're still having a difficult time defining your main requirements, consider bringing in an outside [consultant](#).

They can help evaluate your business needs and design a system that works.

# 04 Organizing Your ERP Team



*When implementing an ERP you'll need to identify which members of your team will be responsible for each specific task during the implementation process.*

Many different stakeholders are involved in ERP implementation, and each has a specific task. Stakeholders can include department managers, executives, and other decision-makers.

You'll need to identify which members of your team are responsible for specific tasks during the implementation process.

The first group of stakeholders is the **executive team**. They are responsible for approving budgets and making sure the company is ready for a change of this magnitude.

They also need to be in agreement about the new system, and understand how it benefits the business.

The next group is the **IT department**. They are responsible for installing and configuring the ERP software, as well as integrating it with existing systems.

They will also need to make sure the company's data is secured during the transition.

The third group includes the system's **users**, who will need training on how to use the ERP before it goes live.

This includes any managers, supervisors, and employees that will use the ERP software daily to perform their jobs.

The final group of stakeholders is the **accounting team**. They are responsible for

**“Coming together is a beginning, staying together is progress, and working together is success”**

— Henry Ford

They are responsible for ensuring that all financial data is migrated to the new system, and that the setup still complies with financial regulations.

We suggest making a list of the key stakeholders, including at least one representative for each business activity.

Choosing one leader from each department ensures you are taking everyone into consideration, which will help with adoption rates within the company.

Once you have identified your key stakeholders and team members, create a timeline for implementation.

This will help establish clear lines of communication between stakeholders, which keeps them up-to-date on the project's progress.



# 05 What to Consider In an ERP

*There are many factors to consider when choosing the right ERP system for your business including, how the software works, who designed it, and what services they provide.*

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There are many factors to consider when choosing the right ERP system for your business, including how the software works, who designed it, and what services they provide.

The main purpose of an ERP is to streamline

business processes and make them easier for employees. A company won't use a system if they have difficulty understanding how it works, which defeats its purpose. The software should be simple enough that beginners can figure things out on their own.

Ask yourself which features are most important, and which systems offer them at an affordable price. Think of features that are relevant to your industry and your business needs.

For example, if you are in the manufacturing industry, you will need a system that can track inventory levels and production schedules, so a system designed for rental management won't suit that need.

Also, consider how the ERP will integrate with your current systems. The easiest



way to get your team to adopt new software is to find one that integrates well with your existing systems. For example, if you are already using Microsoft Dynamics and want to continue using it as part of your ERP, then look for an ERP solution with Dynamics integration to ensure a smooth transition.

Customized ERP solutions with clear descriptions and user-friendly interfaces make adaptation much more straightforward, and much easier than adjusting your company's practices to the limited features of pre-packed software.

Look for a cloud-based solution that lets you add new features and functions as your company grows. All your efforts will eventually lead to securing the company's future, so be sure to choose an ERP that can grow with you.

If you still have questions about which ERP system will work best for your business, we recommend you [speak with a trusted expert](#) who can help guide you towards the right solution.

Here is a list of considerations to keep in mind, when evaluating your ERP options:



## USER-FRIENDLY

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- The main purpose of an ERP is to streamline business processes and make them easier for employees.
- Simple enough that beginners can figure things out on their own.



## RELEVANT-FEATURES

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- Includes features that are relevant to your industry and your business needs.



## FLEXIBLE

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- Integrates with your existing systems.
- Lets you add new features and functions as your company grows.

## Software

- Is the system simple to use and easy to navigate?
- Are updates made frequently (at least once a month)?
- Does it integrate well with current tools?
- Will it be within my budget?
- Is it available on the devices I need (tablet, computer, cell phone)?
- Are the fees clearly specified and without any hidden long-term expenses?
- Are there specific tools for my industry?
- Does it meet all my business requirements?
- Can it accommodate our company's size and growth potential?

## Vendor

- Do they have verifiable experience developing ERPs (case studies, client reviews, timeline)?
- Do I agree with their company values?
- Is their culture compatible with mine?

- Can they help me grow and accomplish my objectives?
- Do they make me feel valued as a customer?
- Are they willing to answer all my questions?
- Are they genuinely interested in understanding my business?
- Do they have the resources to support my company?

## Support

- Do they offer consistent support?
- Will they answer me in less than a day?
- Are they available in my time zone to offer support?
- Do they offer free training after implementation?

# 06 Evaluating Your Vendor's First Contact



*First contact with your vendor is when you should be evaluating the ways in which their product benefits your business.*

When you first meet with an ERP vendor, they will likely deliver a presentation that outlines their product and how it can benefit your business.

This is the time to ask questions and gather information about the product. It's also important to evaluate the vendors themselves. Here are some questions you can ask them at your first meeting:

- Do they have experience addressing similar requirements?
- How do they make sure implementation runs smoothly?
- Do they have experience with your business size?
- What is their implementation process and timeline?
- Is it a true one size fits all product, or will we be able to customize it to fit our unique business needs?
- What kind of support will you get once the project is complete? Do they offer training, continued tech support, and assistance transitioning from your current system?
- Do they have an available reference list of companies that you can talk with?

# 07 RFI and RFP: All You Need to Know

*An RFI or an RFP can help you determine which features, offered by a vendor, relate to your company's needs and the system's cost.*

A request for information (RFI) or a request for proposal (RFP) can help you determine which features a vendor offers and relate them to your company's needs.

It will also provide a better idea of the system's cost, so you can prepare a budget.

## What is a Request for Information?

A request for information (RFI) is a request that helps businesses gather the information they need to make an informed decision.

You can use RFIs to collect data on which vendors provide the most important features. RFIs usually include questions about vendor experience, product functionality, and security standards.

## What is a Request for Proposal?

A request for proposal (RFP) is a formal document that asks vendors to submit a proposal for a product or service.



An RFP should include information that relates specifically to your company. It should also include which features are important to your company and which vendors provide them. Here's an outline of what should be included in an RFP:

- **Purpose:** A brief description of your company, why you need an ERP, which departments will use it, and basic information about which tasks it should manage.
- **Timeline:** A detailed timeline for implementation broken into stages.
- **Requirements:** For each requirement, explain why you need it, why it's important, which areas need it, what it should integrate with, and whether you want it as it is or need any customization.
- **Level of Service and Support:** Request client recommendations, which services you expect, and the level of support you require.
- **Evaluation criteria:** Make sure your

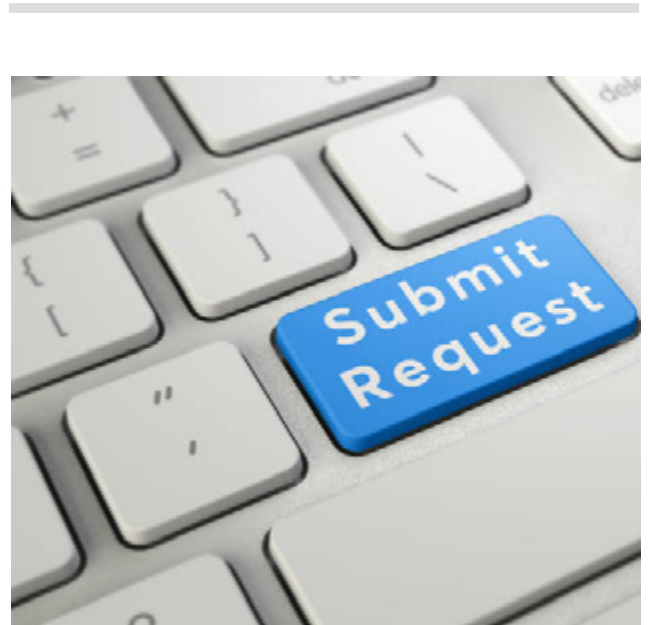
- vendor understands how you will evaluate their responses. Include a clear deadline for the return of responses to your RFP.
- The RFP should include a statement of work (**SOW**) or **project scope** with technical information to provide accurate pricing.

You should send out an RFP when you have gathered all of your system requirements and are ready to compare pricing.

This document can help you narrow down candidates. You should also send out an RFP if you need a custom solution that isn't offered by any of the vendors you're considering.

RFPs are more detailed and in-depth than RFIs, so providers will need more time to respond. This can take anywhere from two weeks to a month, so don't wait until the last minute before requesting one.

This could delay your ERP implementation, and throw you off budget according to your own timeline.



*You should send an RFP when you when you have gathered all of your system requirements and are ready to compare pricing or need a custom solution that isn't offered by any of the vendors you're considering.*

# 08 How to Evaluate Your Proposals

*You'll need to ensure the proposal meets your company's needs by being clear about which features are top priorities and which can be more flexible.*

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Once you've received proposals from vendors, make sure to evaluate them carefully. You'll need to make sure the proposal meets your company's needs, and that the vendor can deliver on its promises.

Start by defining which criteria you should use to evaluate the proposals. Be clear about which features are top priorities for your business and which can be more flexible or customized later.

You should also decide which parts of the ERP implementation will be outsourced, and which will be handled internally.

Once you've narrowed down which types of ERP systems or custom proposals are the most suitable for your company, it's time to start evaluating them:

- How well does the vendor understand my business?
- Which modules does the vendor offer, and how much do they cost?

- Does the proposal have the modules I need?
- Does it meet my functional requirements?
- Does it meet my non-functional requirements?
- Does it integrate with the current tools I have?
- Is it available on the devices I need?
- Is their company culture compatible with mine?
- How long will it take to get the system running? Is their timeline compatible with my goals?
- Which support plans are available and which ones will suit your company best? Are they available in my timezone to offer support?
- Does it include a plan for training employees, and which staff members will be responsible for this task?
- Does it include a plan for migrating old data into the new system?

This will help you to get a good idea of how well the vendor knows your business, and which solutions they would propose for specific challenges.

# 09 Leading Your Team



*To guarantee the success of an ERP implementation you need to keep your team committed and involved.*

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The success of an ERP implementation depends on the commitment and involvement of your internal team. Without their support, the project is likely to fail.

The following points should help guide your team through the challenges of ERP implementation:

- **Have a clear plan and communicate it**
- **Get management on board.** If upper management isn't on board with the new system, it will be hard to get the rest of your employees excited about it.
- **Understand why they might be reluctant to commit.** Employees are often skeptical about change, and some could fear the new system will disrupt their work routine. They might also be reluctant to invest time and effort into something that isn't guaranteed to succeed.
- **Show your team you are committed to**

**often.** Employees will feel more confident in the change if they understand what's happening and why. Explain how it will make their job easier and better in the long run, as well as what is expected of them during this time. This will provide a sense of their role in making the transition successful.

**the project.** This means involving them in the decision-making process, such as which features they think would be useful, and which problems they would like the new system to solve.

- **Create a task force of users** who are enthusiastic about the project and willing to lead by example.
- **Have an open-door policy for feedback** from your team through all stages of implementation. Listen carefully to their concerns and address them as best you can.
- **Celebrate each milestone to show progress and help motivate everyone involved**, including the vendors. Implementing a new system is not easy and often takes longer than expected, so it helps to recognize the hard work your team puts in to make the transition successful.

It's important to keep employees informed with regular progress updates, and to address any questions or concerns about each stage. This way everyone feels like they're part of the team.

*Explain to your employees how an ERP will make their job easier and better in the long run. It will provide a sense of their role in making the transition successful.*





# 10 Training 101



*It's important to have a training plan in place before starting implementation, according to your company's size and industry.*

Training is essential for a successful ERP implementation. Training requirements depend on the company's size, industry, and the ERP software itself, so it's important to establish a detailed training plan before you get too far into implementation.

This begins with initial training during implementation, but it should not end there. Employees need annual refresher courses to ensure they are using the software effectively.

A good ERP system includes training and documentation materials, but it's always a good idea to [hire an outside expert](#) if you need more help.

**In-person/on-site training** can be a viable option for some companies, as they provide hands-on demonstrations to employees while they use the ERP system.

This is especially beneficial for new employees or those who were absent for a recent refresher course. However, in-person training is not always feasible given location and cost constraints.

This option can also take longer to schedule than other types because it hinges on instructor availability. We recommend using on-site instructors at least once a year to keep employees proficient and aware of any updates.

**Virtual/online training** allows real-time participation from users from multiple locations or time zones, without sacrificing the benefits of an instructor.

**“An organization’s ability to learn, and translate that learning into action rapidly is the ultimate competitive advantage”**

—Jack Welch

**Self-paced training** is an option for companies that don’t have the time or budget for in-person or virtual training sessions.

Some ERP systems offer video tutorials and other learning materials as part of their software package, which can be a good way to start employee training.

### **How to make a budget for training?**

To budget for training, we recommend erring on the side of caution and adding 20% to your overall ERP implementation budget.

You might not spend this money right away, but you will usually find refresher courses are necessary to ensure the company remains updated on the new system.

Also, employee productivity can suffer during the initial implementation phase while employees adapt to the software. It is important to take measures that allow your business operations to continue running smoothly during the training period.

Make sure to choose a vendor that has a comprehensive training program and experienced trainers. They should help you get up to speed quickly so you can start taking advantage of the ERP system.



# 11 Choosing the Best Approach

*The right implementation approach can make the difference between a success story and a costly failure.*

There are three main implementation approaches: do-it-yourself, partner-assisted, and full-service. Each has its own set of strengths and weaknesses.

## Do-It-Yourself (DIY)

The DIY approach is perfect for resourceful businesses on a tight budget. You can download an ERP platform and install it yourself. This approach works well if you have experienced internal IT resources that are comfortable implementing new systems.

The downside of this approach is that DIY implementations tend to be more time-consuming. Businesses rarely have the internal resources to implement an ERP system from scratch, so most companies end up using a DIY approach combined with outside assistance in one form or another.

## Partner-Assisted Implementation

Partner-assisted ERP implementation is fast and flexible. This approach lets you buy a



subscription for a pre-configured ERP system, and then a partner will help you with the installation and customization.

This is a viable option for companies without the internal IT resources for DIY implementations, or those who want an expert to handle the important details.

The downside of this approach is that it can be expensive, especially if you need a lot of customization. Also, the partner may not be available or have the expertise for future support.

## Full-Service Implementation

The full-service implementation is the most expensive option, but it's also the most convenient. A full-service provider handles all steps from installation to training to ongoing support.

This approach works if you want to outsource all the important details, but it's usually not an option for businesses on a tight budget.

To make sure your ERP implementation goes smoothly, follow these steps:

- Define objectives for each department (e.g. sales, marketing, customer service) in terms of how they will use the new system to achieve their goals. Be clear about what needs to happen from day one with the old system, and what can wait until the new system is up and running.
- Assign a project manager who makes sure that everyone is aware of their responsibilities, tasks, and deadlines. The project manager should have a solid understanding of the new system and how it will work in your business.
- Set up regular meetings with the stakeholders from each department that need information from other teams to do their jobs. This will keep everyone aligned and on track.
- Train users to navigate the system before they begin working with it. They need to feel comfortable with the change and be able to work without frustration.
- Allow plenty of time for testing and training before the new system goes live. The more prepared your team is, the smoother the transition will be.

ERP implementations can be challenging tasks, but with careful planning, you can make the transition easier for your team. An effective implementation process depends on strong teamwork and communication.



*Careful planning and communication can make the transition easier for your team.*



# See if Salvo Software is the right vendor for you

Salvo Software is a global firm with near-shoring capabilities headquartered in Vancouver, WA.

We specialize in custom-designed enterprise resource planning solutions, and offer cost-effective software solutions that guide businesses, both large and small, through digital transformation.

You'll never have to adjust your practices to fit our tools, since we design ERP development services around the way you do business.

**Transform your enterprise with our  
innovative products and services.  
[Sign up for a free consultation](#)  
today!**

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