

**Ximple Solutions**

*Empowering Distribution Excellence*

# Wholesale Distribution ERP Software RFP Template

A Comprehensive Request for Proposal Framework  
for Wholesale Distribution Software Selection

**100+**

Requirements

**10**

Functional Areas

**Ready**

to Customize

# 1. Executive Overview

Selecting the right Enterprise Resource Planning (ERP) software is one of the most critical technology decisions your wholesale distribution business will make. The right system streamlines operations, reduces costs, and positions your company for sustainable growth. The wrong choice leads to years of frustration, workarounds, and missed opportunities.

This comprehensive RFP template is specifically designed for wholesale distribution companies evaluating ERP and distribution management software solutions. It covers all essential functional areas—from order management and inventory control to B2B eCommerce and industry data integration—ensuring you capture the requirements that matter most to distribution operations.

Whether you're replacing legacy systems or implementing your first integrated ERP, this template provides a structured framework to evaluate vendors, compare solutions, and make an informed decision that serves your business for years to come.

**Need help with your ERP selection process?**

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## 2. RFP Process & Timeline

A well-structured RFP process ensures thorough vendor evaluation while respecting everyone's time. The following framework provides a proven approach for distribution software selection.

### 2.1 Key Milestones

Milestone	Target Date
RFP Issue Date	[DATE]
Intent to Respond Deadline	[DATE]
Vendor Questions Due	[DATE]
<b>Proposal Submission Deadline</b>	<b>[DATE] 5:00 PM</b>
Finalist Selection	[DATE]
Vendor Demonstrations	[DATE RANGE]
Final Selection	[DATE]
<b>Target Go-Live Date</b>	<b>[DATE]</b>

### 2.2 Evaluation Criteria

Evaluation Category	Weight
Functional Requirements Fit	<b>30%</b>
Industry Experience and References	<b>20%</b>
Technical Architecture and Integration	<b>15%</b>
Implementation Approach and Timeline	<b>15%</b>
Total Cost of Ownership	<b>15%</b>
Vendor Viability and Support	<b>5%</b>

### 2.3 Response Codes

Vendors should use these standardized codes when responding to requirements:

- **S = Standard:** Met with out-of-the-box functionality
- **C = Configuration:** Met through system configuration (no custom code)
- **M = Modification:** Requires custom development
- **T = Third Party:** Met through third-party integration
- **F = Future:** Planned for future release
- **N = Not Available:** Cannot be met

### 3. Functional Requirements

The following sections detail the essential capabilities for wholesale distribution operations. Requirements are prioritized as Critical, High, Medium, or Low to help vendors understand relative importance.

#### 3.1 Sales Order Management

#	Requirement	Priority	Response	Comments
1	Support for multiple order types (standard, blanket, will-call, direct ship)	Critical		
2	Real-time inventory availability during order entry across all locations	Critical		
3	Customer-specific pricing with matrix pricing and multiple price levels	Critical		
4	Automated credit check and credit hold management	Critical		
5	Quote management with quote-to-order conversion	High		
6	Order promising with available-to-promise (ATP) dates	High		
7	Support for kits, assemblies, and configured products	High		
8	Automated backorder management and allocation	High		
9	Order modification and cancellation with audit trail	Medium		
10	Integration with shipping carriers for rate shopping	Medium		

#### 3.2 Purchasing and Procurement

#	Requirement	Priority	Response	Comments
1	Purchase order creation with vendor pricing and terms	Critical		
2	Trade Service integration for real-time vendor pricing and availability	Critical		
3	Automated replenishment based on min/max, reorder points, or demand	Critical		
4	Vendor performance tracking and scorecards	High		
5	Support for blanket purchase orders and releases	High		
6	Three-way match (PO, receipt, invoice) for AP	High		
7	EDI integration for PO transmission and acknowledgment	High		
8	Drop ship and direct ship order management	High		
9	Vendor rebate tracking and management	Medium		
10	Purchase requisition workflow and approvals	Medium		

### 3.3 Inventory Management

#	Requirement	Priority	Response	Comments
1	Multi-location inventory tracking with real-time visibility	Critical		
2	Lot tracking and serial number management	Critical		
3	Bin/location management within warehouses	Critical		
4	Cycle counting and physical inventory procedures	High		
5	Inventory transfer between locations	High		
6	Inventory valuation (FIFO, LIFO, average cost)	High		
7	Dead stock and slow-moving inventory reporting	Medium		
8	Inventory adjustment with reason codes and approval workflow	Medium		
9	Consignment inventory management	Medium		
10	Unit of measure conversion and handling	High		

### 3.4 Warehouse Management

#	Requirement	Priority	Response	Comments
1	RF/barcode scanning for receiving, picking, and shipping	Critical		
2	Pick ticket generation with optimized pick paths	Critical		
3	Receiving with PO matching and exception handling	Critical		
4	Wave planning and batch picking capabilities	High		
5	Packing and shipping workstation support	High		
6	Cartonization and package optimization	Medium		
7	Cross-docking capabilities	Medium		
8	Returns processing (RMA) and put-away	High		
9	Labor management and productivity tracking	Low		
10	Voice-directed picking support	Low		

### 3.5 Pricing and Customer Management

#	Requirement	Priority	Response	Comments
1	Customer master with multiple ship-to and bill-to addresses	Critical		
2	Matrix pricing with category-specific multipliers	Critical		
3	Contract pricing with effective dates	Critical		
4	Job/project-based pricing	High		
5	Promotional pricing with date ranges	High		
6	Customer hierarchy for parent/child relationships	High		
7	Customer-specific product catalogs and restrictions	Medium		
8	Credit limit management and aging analysis	High		
9	Customer rebate programs and tracking	Medium		
10	Sales rep assignment and commission calculation	High		

### 3.6 B2B eCommerce

#	Requirement	Priority	Response	Comments
1	Customer-specific pricing displayed in real-time	Critical		
2	Account management with multiple users and permissions	Critical		
3	Real-time inventory availability by location	Critical		
4	Order history and tracking for customers	Critical		
5	PunchOut support (cXML and OCI protocols)	Critical		
6	Shopping lists and quick order entry	High		
7	Product search with faceted filtering	High		
8	Quote request and online approval workflow	High		
9	Mobile-responsive design for job site ordering	High		
10	Online invoice viewing and payment	Medium		

### 3.7 Financials

#	Requirement	Priority	Response	Comments
1	General ledger with multi-company support	Critical		
2	Accounts receivable with customer statements	Critical		
3	Accounts payable with check printing and ACH	Critical		
4	Bank reconciliation	High		
5	Fixed asset management	Medium		
6	Multi-currency support	Low		
7	Budgeting and forecasting	Medium		
8	Financial reporting and consolidation	High		
9	Tax calculation and reporting (sales tax, use tax)	Critical		
10	Revenue recognition compliance	Medium		

### 3.8 Reporting and Analytics

#	Requirement	Priority	Response	Comments
1	Standard distribution reports (sales, inventory, purchasing)	Critical		
2	Ad-hoc reporting and query capabilities	High		
3	Dashboard with KPIs and visualizations	High		
4	Report scheduling and distribution	Medium		
5	Export to Excel and other formats	High		
6	Drill-down from summary to detail	High		
7	Integration with business intelligence tools	Medium		
8	Custom report builder for end users	Medium		
9	Real-time operational reporting	High		
10	Historical trend analysis	Medium		

### 3.9 Technical Requirements

#	Requirement	Priority	Response	Comments
1	Cloud deployment option (SaaS or hosted)	High		
2	On-premise deployment option	Medium		
3	API availability for integration (REST/SOAP)	Critical		
4	Single sign-on (SSO) support	High		
5	Role-based security with granular permissions	Critical		
6	Audit trail for all transactions	Critical		
7	Data backup and disaster recovery	Critical		
8	Mobile application for iOS and Android	High		
9	Support for standard browsers (Chrome, Edge, Firefox)	Critical		
10	Scalability to support business growth	High		

**Want to see these capabilities in action?**

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## 4. Vendor Information Requirements

Request the following information from each vendor to properly evaluate their solution and organization.

### 4.1 Company Profile

1. Company legal name and headquarters location
2. Year founded and ownership structure (public, private, PE-backed)
3. Total number of employees (overall and in relevant functions)
4. Annual revenue and financial stability indicators
5. Number of customers overall and in distribution industry
6. Recent acquisitions, mergers, or significant corporate changes

### 4.2 Product Information

1. Product name and current version
2. Technology platform and architecture overview
3. Product history and major release timeline
4. Roadmap for next 12-24 months
5. Frequency of releases and upgrade process
6. Third-party certifications and compliance (SOC 2, ISO, etc.)

### 4.3 Industry Experience

1. Number of wholesale distribution customers
2. Experience with IDW and Trade Service integration
3. Specific functionality for your distribution vertical
4. Industry partnerships and associations

## 5. Implementation Approach

Understanding a vendor's implementation methodology is crucial to project success. Request detailed information about the following areas.

### 5.1 Implementation Methodology

1. Describe implementation methodology and project phases
2. Provide estimated timeline for full implementation
3. Describe resource requirements (vendor and customer)
4. Explain data migration approach and tools
5. Describe testing methodology and user acceptance approach
6. Explain change management and training approach

### 5.2 Project Team

1. Describe proposed project team structure and roles
2. Provide resumes for key team members
3. Indicate team members' distribution industry experience
4. Describe use of subcontractors or partners
5. Explain escalation and issue resolution process

### 5.3 Risk Management

1. Identify key implementation risks and mitigation strategies
2. Describe approach to scope management
3. Explain how project delays are handled contractually
4. Describe contingency planning approach

## 6. Pricing Framework

Request comprehensive pricing information to understand total cost of ownership. All pricing should be provided in a separate Excel workbook with supporting detail.

### 6.1 Software Licensing

- License model (perpetual, subscription, user-based, transaction-based)
- Base license fees by module
- User licensing (named users, concurrent users)
- Growth pricing and volume discounts
- Optional modules and add-ons

### 6.2 Implementation Services

- Project management
- Configuration and setup
- Data migration
- Integration development
- Testing and quality assurance
- Training (end user, administrator, train-the-trainer)
- Go-live support

### 6.3 Ongoing Costs

- Annual maintenance and support fees
- Hosting/infrastructure costs (if applicable)
- Third-party integration fees
- Upgrade and enhancement costs
- Additional training and support options

## 7. Reference Requirements

Request at least three references from similar wholesale distribution customers. For each reference, collect the following information:

Field	Reference 1
Company Name	
Contact Name	
Contact Title	
Phone / Email	
Implementation Date	
Modules Implemented	
Company Size	

*(Duplicate this table for Reference 2 and Reference 3)*

## 8. Terms and Conditions

### 8.1 Confidentiality

This RFP and all information contained herein is confidential and proprietary to [COMPANY NAME]. Vendors agree to maintain confidentiality and use the information solely for the purpose of preparing a proposal response.

### 8.2 Proposal Validity

Proposals must remain valid for a minimum of ninety (90) days from the submission deadline.

### 8.3 Right to Reject

[COMPANY NAME] reserves the right to reject any or all proposals, to waive informalities in the RFP process, and to negotiate with any vendor. The Company is not obligated to accept the lowest-priced proposal.

### 8.4 Cost of Proposal Preparation

All costs incurred in the preparation of proposals shall be borne by the vendor. [COMPANY NAME] will not reimburse any vendor for proposal preparation costs.

### 8.5 Proposal Ownership

All proposals become the property of [COMPANY NAME] upon submission and will not be returned.

### 8.6 Contract Negotiation

Selection of a vendor does not constitute agreement to all terms and conditions contained in the vendor's proposal. [COMPANY NAME] reserves the right to negotiate terms and conditions as part of contract finalization.

Ready to start your  
**ERP Selection Journey?**

**Contact Ximple Solutions**

Let's discuss how we can help transform your wholesale distribution operations with purpose-built ERP solutions.

Email: [info@ximplesolution.com](mailto:info@ximplesolution.com)

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Website: [www.ximplesolution.com](http://www.ximplesolution.com)

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