METAL TREATING INSTITUTE

# ERP Vendor Comparative Questionnaire

*A standardized evaluation tool for heat-treating ERP solutions*

**PURPOSE**

MTI will use vendor responses to help members compare ERP platforms on a consistent basis. Please answer each item as specifically as possible and distinguish capabilities available today from custom development or roadmap items.

## Vendor Information

| | |
|---|---|
| **Company Name** | |
| **ERP Product / Version** | |
| **Primary Contact / Title** | |
| **Email / Phone** | |

## 1. Company & Heat-Treat Experience

| Question / Capability | Vendor Comments |
|---|---|
| How many years has your company worked with heat-treat companies? | |
| How did your organization develop its internal knowledge of heat-treat operations? | |
| How many heat-treat companies currently use your ERP? | |
| Approximately how many heat-treat facilities are currently running your system? | |
| What percentage of your customers are commercial heat treaters versus captive heat-treat operations? | |
| Which heat-treat processes are currently supported by your system? | |
| Do you have employees dedicated specifically to heat-treat implementation and/or support? | |
| Can you provide three heat-treat customer references? | |

## 2. Core ERP & Heat-Treat Functionality

For each capability, use the standard status and cost codes shown below.

## Standard Response Codes

| AT | TP | CR | RM | NA |
|---|---|---|---|---|
| Available Today | Available Through Third Party | Customization Required | On Roadmap | Not Available |

Standard Cost Codes: Included in Base Price (IB) | Additional Cost (AC)

| Question / Capability | Status | Cost |
|---|---|---|
| Quality management | | |
| Maintenance / preventive maintenance | | |
| Scheduling | | |
| Production management | | |
| Change control / revision control | | |
| Training management | | |
| EHS | | |
| Certifications / certificate management | | |
| Accounting | | |
| Customer service | | |
| Shipping / receiving | | |
| Timekeeping / payroll support | | |
| Customer portal | | |
| APQP | | |
| Lot and batch traceability | | |
| Split and combined lots | | |
| Furnace / load scheduling | | |
| Recipe / process specification control | | |
| Pyrometry records | | |
| Furnace and equipment calibration | | |
| Thermocouple tracking | | |
| Quench tracking | | |
| Material certifications | | |
| Certificate of conformance generation | | |
| Customer-specific specifications | | |
| Nonconformance management | | |
| Corrective actions | | |
| Job costing by furnace / load | | |
| Energy usage by job / load | | |
| Outside processing | | |
| Rework and scrap tracking | | |
| Real-time WIP visibility | | |
| Mobile / tablet shop-floor entry | | |
| Barcode capability | | |
| RFID capability | | |
| Automated customer notifications | | |
| Paper traveler and/or paper certificate capability | | |

## 3. Implementation, Training & Support

| Question / Capability | Supplier Comments |
|---|---|
| What is your typical implementation timeline for a heat-treat customer? | |
| What customer resources are typically required during implementation? | |
| Is implementation performed by your employees, third parties, or both? | |
| What implementation services are included in the quoted price versus charged separately? | |
| How is historical data migrated and validated? | |
| What training is provided before go-live? | |
| Is on-site training available? | |
| Is a dedicated implementation manager assigned? | |
| How are scope, budget, and timeline overruns handled? | |
| Describe your support model: live support, dedicated contact, online knowledge base, AI, after-hours, and any upcharges. | |
| What are your support response-time commitments / SLAs? | |
| What are your published system uptime SLAs? | |

## 4. Data, Integration & Connectivity

| Question / Capability | Supplier Comments |
|---|---|
| Who owns the customer data? | |
| How is tenant segregation handled? | |
| Can data be transferred from an existing ERP? What data can be migrated? | |
| What is the process for extracting ALL historical data if a customer later changes ERP systems? | |
| What backend/database technology does the system use (SQL, other)? | |
| Does the system support EDI? | |
| Does the system integrate with laboratory/testing systems? | |
| Does the system integrate with UPS, FedEx, or other shipping systems? | |
| Can approved third-party applications write data back into the ERP? | |
| Does the system provide a documented API and/or MCP (Model Context Protocol) server for integration with external applications, AI agents, and other systems? | |
| Can customers use the API or MCP server to securely access their own ERP data and, where authorized, create or update ERP data from third-party applications or AI agents? | |
| What native integrations are currently available for accounting, payroll, CRM, shipping (UPS/FedEx), laboratory/testing, and business intelligence platforms such as Power BI? | |
| Can the ERP integrate with plant-floor systems, particularly furnace data acquisition systems, historians, PLC/SCADA systems, or other process-monitoring platforms? | |
| What is your overall integration architecture for systems without a native connector-REST API, MCP server, webhooks, middleware, direct database access, or other methods-and are these capabilities included in the base price or subject to additional licensing or usage fees? | |

## 5. Cybersecurity, Compliance & Hosting

| Question / Capability | Supplier Comments |
|---|---|
| Is the solution cloud-hosted, on-premise, or available in both models? | |
| Where is customer data physically hosted? | |
| Who is the cloud hosting provider? | |
| Is any support, data hosting, or system operation located outside the United States? | |
| Is data encrypted at rest and in transit? | |
| Is multi-factor authentication supported and/or required? | |
| Does the system support role-based permissions? | |
| Are user and system audit logs maintained? | |
| How frequently are backups performed? | |
| Describe the disaster recovery and business continuity process. | |
| What are your Recovery Time Objective (RTO) and Recovery Point Objective (RPO)? | |
| Has your organization experienced a material cybersecurity breach in the past five years? If yes, explain at a high level. | |
| Do you undergo independent penetration testing? | |
| What is your SOC 2 Type II status? | |
| What is your NIST 800-53 compliance status? | |
| Are you FedRAMP authorized/accredited, or are you pursuing it? | |
| Are you ITAR registered or willing to register? | |
| Do you offer hosting/configuration options appropriate for customers with CMMC requirements? | |
| How are security patches and vulnerability updates deployed? | |
| How can customers obtain your current compliance documentation? | |

## 6. Artificial Intelligence & Automation

| Question / Capability | Supplier Comments |
|---|---|
| Which AI capabilities are available in the product today? | |
| Which AI capabilities are on the product roadmap? | |
| What AI model/provider(s) are used? | |
| Is customer data ever used to train your AI models? | |
| Can customers opt out of AI processing? | |
| Does customer information leave the ERP environment when AI is used? | |
| Is AI access limited by the same user permissions and role controls as the ERP? | |
| Does the system maintain an audit trail of AI-generated recommendations/actions? | |
| Can AI execute transactions or workflow actions, or does it only recommend actions? | |
| Can AI perform data logging and automated workflows? | |
| Can approved AI plug-ins or connectivity tools work with data across ERP modules? | |
| If AI uses an LLM, is it isolated/closed to the customer environment or able to learn from other systems? | |

## 7. Customer References, Terms & Product Roadmap

| Question / Capability | Vendor Comments |
|---|---|
| Provide three current heat-treat customer references, including company, contact, and implementation year. | |
| Provide a copy of the current customer terms and conditions / user agreement. | |
| How often are major product releases issued? | |
| How are customers informed of product changes and deprecations? | |
| Describe the top heat-treat-related capabilities planned for the next 12-24 months. | |
| What percentage of annual revenue is invested in product development / R&D? | |
| Describe your process for customer enhancement requests. | |
| Identify any major modules or functions that rely on third-party products or services. | |

## General Comments:

## Vendor Certification

By submitting this questionnaire, the vendor confirms that responses accurately represent current product capabilities and clearly distinguish current functionality from custom development, third-party solutions, and roadmap items.

| | |
|---|---|
| **Completed By / Title** | |
| **Date** | |
| **Authorized Signature (optional)** | |