# DRP Readiness Checklist

Is Your Acumatica Operation Ready to Activate Distribution Requirements Planning?

Crestwood Associates | ERP Solution Experts

**How to use this checklist:**
Work through each section with your operations or inventory planning lead. A score of 4 or more "Yes" answers across Sections 1–3 indicates DRP activation is the right next step. Share completed results with your Crestwood account team.

## 1 Demand Complexity

*Check every item that accurately describes your current operation.*

Section 1 score: ____ / 5

- ☐ Demand for at least some SKUs is seasonal, promotional, or irregular (not flat and predictable year-round).
- ☐ Your team manages blanket sales orders or long-term customer supply agreements that drive forward-looking demand.
- ☐ At least one product category involves kits, bundles, or assemblies built from multiple components.
- ☐ Vendor lead times vary by supplier or item, and some lead times exceed 2 weeks.
- ☐ Your planning team maintains a demand forecast outside of Acumatica (spreadsheet or another tool) to supplement what the system produces.

*If yes, that forecast should be driving DRP — not living in Excel.*

## 2 Warehouse & Supply Chain Structure

Section 2 score: ____ / 5

- ☐ Your operation uses 2 or more stocking locations (warehouses, distribution centers, or 3PL sites).
- ☐ Stock balancing between locations is currently managed manually, by email, or by phone.
- ☐ Transfer orders between warehouse locations are a regular part of your replenishment cycle.
- ☐ Rush orders (expedited purchases to cover shortfalls) occur more than twice per month.

*Rush order frequency is the clearest early signal that planning is reactive.*

- ☐ Excess stock accumulates at one location while another location runs short of the same SKU.

## 3 Current Acumatica Configuration

*Assess what is already configured in your system.*

Section 3 score: ____ / 5

- ☐ Vendor lead times are entered and maintained in Acumatica for your top 20 purchased items.
  *DRP uses lead times to calculate order-by dates. Missing data produces unreliable recommendations.*
- ☐ Safety stock levels are defined in Acumatica for items with variable demand.
- ☐ Sales orders in Acumatica reflect actual committed customer demand (not placeholders or estimates).
- ☐ Inventory on-hand balances are accurate within 95% or better, verified by a recent cycle count or physical inventory.

*DRP regeneration calculates from on-hand balances. Inaccurate inventory produces inaccurate plans.*

- ☐ Your Acumatica license includes the Distribution module (confirm with your Crestwood account team if unsure).

## 4 Organizational Readiness

*DRP requires a defined planning process, not just software configuration.*

Section 4 score: ____ / 3

- ☐ There is a named person (or team) responsible for inventory planning decisions in your organization.
- ☐ Your planning team has capacity to run a DRP regeneration and review exception messages on a weekly cadence.

*DRP is most effective when regenerations run on a consistent, defined schedule.*

- ☐ Leadership is open to shifting from reactive purchasing to a forward-looking, system-driven planning model.

**Score Summary | Total "Yes" answers from Sections 1–3: _____ / 15**

| | |
|---|---|
| **11–15:** | DRP activation is the right immediate next step. Contact your Crestwood account team. |
| **6–10:** | DRP is likely right but data cleanup (lead times, safety stock) should come first. |
| **0–5:** | Inventory Replenishment may be sufficient. Discuss your catalog mix with Crestwood. |

**Crestwood Associates**
ERP Implementation & Advisory Since 1998
crestwood.com | 847.394.8820

*Ready to activate DRP?*
**Talk to your Crestwood Account team | sales@crestwood.com**

Acumatica
Gold Certified Partner