✅ ChecklistGuro

ERP Customization Review Checklist

Customization Requirements Alignment

Verify customizations directly address documented business needs and align with overall ERP strategy.

Original Business Requirement Description

Write something...

Customization Solution Description

Write something...

Requirement Fulfillment Status

☐ Fully Met

☐ Partially Met

☐ Not Met

Requirement ID (Reference)

Write something...

Explanation of Fulfillment (if Partial or Not Met)

Write something...

Development Standards Compliance

Ensure adherence to established coding standards, naming conventions, and documentation practices.

Code Review Score (0-10)

Enter a number...

Naming Conventions Followed?

- [ ] Yes
- [ ] Partially
- [ ] No

Code Comments Adequacy

Write something...

Error Handling Implemented?

- [ ] Yes
- [ ] No
- [ ] Partial

Code Style Guide Adherence (Screenshot)

⬆ Upload File

Impact Assessment

Assess the potential impact of customizations on existing system functionality, performance, and integrations.

Describe the business process(es) directly affected by the customization.

Write something...

Estimated impact on system performance (e.g., response time increase) in percentage.

Enter a number...

Which modules are impacted?

☐ Finance
☐ Manufacturing
☐ Supply Chain
☐ HR
☐ Sales
☐ Other

Estimated go-live date for the customization.

Enter date...

Potential risks associated with the customization (select all that apply)

- ☐ Data Integrity Issues
- ☐ Integration Conflicts
- ☐ User Adoption Challenges
- ☐ Security Vulnerabilities
- ☐ Performance Degradation
- ☐ None

Describe any potential workaround needed to mitigate the potential risk.

Write something...

Security Review

Evaluate potential security vulnerabilities introduced by customizations and ensure appropriate controls are implemented.

Description of Customization Security Risks

Write something...

Authentication Method Used

- ☐ Standard ERP Authentication
- ☐ Custom Authentication
- ☐ Single Sign-On (SSO)

Minimum Password Length Required (Customizations)

Enter a number...

Security Controls Implemented

- ☐ Role-Based Access Control (RBAC)
- ☐ Data Encryption
- ☐ Input Validation
- ☐ Output Encoding
- ☐ Secure Coding Practices

Security Assessment Report (if applicable)

⬆ Upload File

Testing & Validation

Confirm thorough testing, including unit, integration, and user acceptance testing, has been conducted.

Number of Test Cases Executed

Enter a number...

Number of Test Cases Passed

Enter a number...

Number of Test Cases Failed

Enter a number...

Summary of Critical Failures

Write something...

Testing Environments Used (Select all that apply)

☐ Development

☐ QA/Staging

☐ UAT

Date of Last Regression Testing

Enter date...

Upload Test Results Summary Report

⬆ Upload File

Documentation & Training

Verify comprehensive documentation exists for customizations and relevant training has been provided to users.

Customization Documentation Summary

Write something...

Customization Design Document

⬆ Upload File

Number of Users Trained

Enter a number...

Last Training Session Date

Enter date...

Training Materials Provided (Select all that apply)

☐ User Manual
☐ Quick Reference Guide
☐ Video Tutorials
☐ FAQ Document

Training Feedback Summary

Write something...

Maintainability & Support

Assess the long-term maintainability of customizations and availability of support resources.

Estimated Effort for Customization Maintenance (Hours/Week)

Enter a number...

Documentation Summary: Description of Customization Logic and Approach

Write something...

Support Team Ownership

- [ ] Internal IT
- [ ] External Vendor
- [ ] Hybrid (Internal & Vendor)

Last Code Review Date

Enter date...

Skills Required for Maintenance

- [ ] ERP Development (e.g., ABAP, C#)
- [ ] Database Administration
- [ ] Business Process Expertise
- [ ] Integration Technologies

Known Limitations & Workarounds

Write something...

Version Control & Deployment

Confirm proper version control procedures are in place and the deployment process is well-defined and documented.

Repository Name

Write something...

Version Number

Enter a number...

Deployment Date

Enter date...

Deployment Notes

Write something...

Deployment Method

☐ Automated

☐ Manual

Deployment Script (if applicable)

⬆ Upload File

Audit Trail & Logging

Verify customizations include adequate audit trails and logging for tracking changes and troubleshooting issues.

Description of Audit Trail Implementation

Write something...

Log Rotation Frequency (Days)

Enter a number...

Logged Events (e.g., record creation, updates, deletions)

☐ Record Creation
☐ Record Update
☐ Record Deletion
☐ User Login/Logout
☐ Custom Workflow Events

Last Audit Log Review Date

Enter date...

Notes from Last Audit Log Review

Write something...

Performance Optimization

Assess the impact of customizations on system performance and identify potential optimization opportunities.

Average Transaction Response Time (seconds)

Enter a number...

Peak System Load (concurrent users)

Enter a number...

Database Query Execution Time (average)

Enter a number...

Caching Strategy Implemented?

- [ ] Yes
- [ ] No
- [ ] Partial

Detailed Description of Performance Tuning Efforts

Write something...

Database Indexing Adequacy?

- ☐ Optimal
- ☐ Needs Review
- ☐ Insufficient