



ERP Data Integrity & Cleansing Checklist 2026

Pre-Cleansing Data Audit & Assessment

Identify existing data quality issues, define scope of the cleansing project, and establish baseline metrics for data accuracy and completeness.

Data Audit Scope Definition

Identified Data Quality Issues

Audit Commencement Date

Affected Data Domains

- ☐ Customer Master Data
- ☐ Vendor/Supplier Master Data
- ☐ Inventory & Product Master
- ☐ Financial/GL Accounts
- ☐ Employee/HR Records

Estimated Total Record Count

Enter a number...

Source Data Sample Report

 Upload File

Data Governance & Standard Definition

Establish standardized formats, naming conventions, and master data rules to ensure consistency across all ERP modules.

Data Standard Naming Convention Documentation

Write something...

Definition of Data Ownership & Stewardship Roles

Write something...

Standardized Date Format

- ☐ YYYY-MM-DD
- ☐ DD-MM-YYYY
- ☐ MM/DD/YYYY

Mandatory Data Attributes for Master Records

- ☐ Customer ID
- ☐ Vendor Tax ID
- ☐ SKU Code
- ☐ Currency Code
- ☐ Warehouse Location

Data Dictionary & Schema Reference Document

 [Upload File](#)

Data Governance Officer Approval

Data Deduplication & Record Merging

Identify and eliminate redundant records, duplicate customer profiles, and overlapping vendor entries to ensure a single version of truth.

Target Data Domains for Deduplication

- ☐ Customer Master Data
- ☐ Vendor/Supplier Master Data
- ☐ Employee/HR Records
- ☐ Product/SKU Catalog
- ☐ Asset/Inventory Records

Primary Matching Logic Method

- ☐ Exact Match (Attribute-based)
- ☐ Fuzzy Logic (Similarity-based)
- ☐ Deterministic Matching

Duplicate Threshold Tolerance (%)

Write something...

Merging Conflict Resolution Rules

Write something...

Duplicate Detection Report (Source Log)

 Upload File

Data Steward Approval

Data Validation & Error Detection

Scan for missing mandatory fields, orphaned records, invalid characters, and structural inconsistencies within the database.

Data Validation Scope

- ☐ Master Data (Customers/Vendors)
- ☐ Financial/GL Data
- ☐ Inventory/SKU Data
- ☐ Employee/HR Data

Error Types Detected

- ☐ Missing Mandatory Fields
- ☐ Duplicate Records
- ☐ Format Inconsistencies
- ☐ Orphaned/Unlinked Records
- ☐ Invalid Logic/Out-of-range Values

Total Error Count Identified

Validation Completion Date

Enter date...

Detailed Error Log Summary

Write something...

Error Report CSV/Excel



Upload File

Master Data Enrichment & Enrichment

Augment existing datasets with missing critical information, such as updated tax IDs, contact details, and standardized geographic codes.

Target Data Fields for Enrichment

Write something...

Data Sources for Enrichment

- ☐ Third-party APIs
- ☐ Legacy System Exports
- ☐ Manual Research
- ☐ Customer Surveys
- ☐ Public Registries

Enrichment Completion Deadline

Target Accuracy Threshold (%)

Source Enrichment Mapping Document

 Upload File

Enrichment Priority Level

- ☐ Critical - High Impact
- ☐ Standard - Routine
- ☐ Low - Non-operational

Data Transformation & Format Standardization

Convert legacy data formats, date structures, and currency symbols into the standardized 2026 ERP-compliant architecture.

Transformation Standard Template

- ☐ Standard ISO Format
- ☐ Legacy System Format
- ☐ Custom Corporate Standard

Data Types Targeted for Standardization

- ☐ Date/Time Formats
- ☐ Currency & Decimal Precision
- ☐ Address & Geographic Strings
- ☐ Alphanumeric Identifiers (SKUs/IDs)
- ☐ Unit of Measure (UoM)

Transformation Logic Documentation

Write something...

Transformation Completion Deadline

Enter date...

Mapping Specification Document

 Upload File

Error Tolerance Threshold (%)

Enter a number...

Data Cleansing Execution & Loading

Execute the physical cleansing process and perform controlled uploads into the ERP production environment using validated scripts.

Execution Start Date

Enter date...

Data Loading Environment

- ☐ Sandbox/Testing
- ☐ Staging
- ☐ Production

Data Modules Cleansed

- ☐ Finance
- ☐ Human Resources
- ☐ Supply Chain
- ☐ Sales & CRM
- ☐ Manufacturing

Total Records Processed

Enter a number...

Cleansing Error Log Summary

Write something...

Post-Load Validation Report

 Upload File

Data Steward Approval

Post-Cleansing Verification & Quality Assurance

Conduct post-load audits and spot checks to verify that the cleaned data matches the target state and that no structural corruption occurred.

Verification Completion Date

Data Integrity Status

- ☐ Passed
- ☐ Passed with Minor Issues
- ☐ Failed - Requires Re-cleansing

Total Records Verified

Verified Data Domains

- ☐ Customer Master Data
- ☐ Vendor/Supplier Master Data
- ☐ Inventory/SKU Data
- ☐ Financial/GL Accounts
- ☐ Employee/HR Records

Discrepancy Notes & Remediation Plan

Write something...

Post-Cleansing Audit Report

 Upload File

Data Steward Approval

Data Security & Access Control Review

Ensure that sensitive or PII (Personally Identifiable Information) data cleaned during the process is correctly masked or restricted per 2026 compliance standards.

Sensitive Data Categories Verified

- ☐ Personally Identifiable Information (PII)
- ☐ Financial/Banking Information
- ☐ Intellectual Property/Trade Secrets
- ☐ Vendor/Supplier Contract Details
- ☐ Employee Records/HR Data

Data Masking Status

- ☐ Fully Masked
- ☐ Partially Masked
- ☐ Not Masked (Requires Action)

Access Control Auditor Name

Write something...

Review Completion Date

Enter date...

Identified Security Vulnerabilities

Write something...

Data Privacy Officer Approval

Maintenance & Continuous Monitoring Plan

Establish automated workflows and periodic audit schedules to prevent data decay and maintain the integrity of the cleaned dataset.

Next Scheduled Data Audit Date

Enter date...

Audit Frequency

- ☐ Weekly
- ☐ Monthly
- ☐ Quarterly
- ☐ Annually

Monitored Data Domains

- ☐ Customer Master Data
- ☐ Vendor/Supplier Master Data
- ☐ Inventory & Product Records
- ☐ Financial & General Ledger
- ☐ Employee & HR Records

Data Quality Remediation Protocol

Write something...

Data Integrity Audit Report Template

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Data Steward Approval

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🔑 Finish

 Generate Sample Report