



# ERP End-User Support Checklist

## Initial Issue Logging & Triage

Covers steps for users to report issues, initial assessment and prioritization.

### Describe the Issue

Write something...

### Module Affected

- ☐ Finance
- ☐ Sales
- ☐ Inventory
- ☐ HR
- ☐ Manufacturing
- ☐ Other

### Severity Level

- ☐ Critical - System Down
- ☐ High - Significant Impact
- ☐ Medium - Moderate Impact
- ☐ Low - Minor Inconvenience

### Number of Users Affected (Estimate)

Enter a number...

### Date Issue Started

Enter date...

### Time Issue Started (Approximate)

Enter time...

## Troubleshooting & Resolution

Details common troubleshooting steps and resolution procedures.

### Describe the User's Reported Issue

Write something...

### Module Affected (e.g., Finance, HR, Inventory)

- ☐ Finance
- ☐ HR
- ☐ Inventory
- ☐ Sales
- ☐ Manufacturing
- ☐ Other

### Error Code (if applicable)

Enter a number...

### Steps Taken for Troubleshooting

Write something...

### Resolution Status

- ☐ Resolved
- ☐ Workaround Applied
- ☐ Deferred
- ☐ Requires Development Fix

### Detailed Resolution Description

Write something...

### Resolution Date

Enter date...

### Resolution Time

Enter time...

## Knowledge Base & Self-Service

Focuses on leveraging knowledge base articles and self-service options.

### Link to Main Knowledge Base

Write something...

### Link to FAQ Section

Write something...

### Did the KB article resolve your issue?

- ☐ Yes
- ☐ No
- ☐ Partially

### Article Rating (1-5)

Enter a number...

### Related Keywords for Article Search

- ☐ Navigation
- ☐ Reporting
- ☐ Invoicing
- ☐ Inventory
- ☐ User Management

### Suggestion for Knowledge Base Improvement

Write something...

## Escalation Procedures

Outlines steps for escalating complex issues to higher-level support or specialized teams.

### Issue Severity Level

- ☐ Low
- ☐ Medium
- ☐ High
- ☐ Critical

### Initial Support Tier

- ☐ Tier 1
- ☐ Tier 1.5
- ☐ Tier 2

### Detailed Description of Escalation Reason

Write something...

### Escalation Route

- ☐ Functional Team Lead
- ☐ Technical Support Team
- ☐ ERP Administrator

### Estimated Resolution Time (Hours)

### Escalation Date

### Escalation Time

## Communication & Follow-up

Ensures clear communication with users throughout the support process and timely follow-up.

### Initial Contact Date

### Time of Initial Contact

### Communication Method (e.g., Email, Phone, Chat)

### Summary of Initial Communication with User

Write something...

### User Communication Preference

- ☐ Email
- ☐ Phone
- ☐ Chat
- ☐ Other

### Date of Last Update Sent to User

Enter date...

### Details of Updates Provided to User

Write something...

### User Acknowledgment of Resolution

- ☐ Acknowledged
- ☐ Pending
- ☐ Not Contactable

### Number of Follow-up Communications

Enter a number...

# System Access & Permissions

Addresses user account management, password resets, and access control issues.

## Username

## User ID

## Access Level

- ☐ Read Only
- ☐ Basic User
- ☐ Advanced User
- ☐ Administrator

## Module Access

- ☐ Finance
- ☐ Sales
- ☐ Inventory
- ☐ Manufacturing
- ☐ HR

## Last Password Reset Date



### Password Expiration Time

### Justification for Elevated Permissions (if applicable)

## Reporting & Analytics

Covers tracking support metrics, identifying trends, and improving support processes.

### Total Support Tickets Received

### Tickets Resolved Within SLA

### Average Resolution Time (hours)

### First Contact Resolution Rate (%)

### Primary Issue Category

- ☐ System Error
- ☐ Access Issue
- ☐ Process Question
- ☐ Report Issue
- ☐ Other

### Reporting Period End Date

Enter date...

### Summary of Key Trends & Observations

Write something...

## Training & Documentation

Ensures users have adequate training materials and documentation to avoid common issues.

### Training Material Availability

Write something...

### Training Delivery Method

- ☐ Online
- ☐ In-Person
- ☐ Blended

### Number of Training Sessions Offered

Enter a number...

### Training Manual (PDF)

 Upload File

### Topics Covered in Training

- ☐ Module Configuration
- ☐ Data Entry
- ☐ Reporting
- ☐ Workflow Management

### Last Training Material Update Date

Enter date...

## Post-Resolution Verification

Confirms the issue is fully resolved and the user is satisfied with the support provided.

### Resolution Time (Minutes)

Enter a number...

### Issue Severity (Post-Resolution)

- ☐ Low
- ☐ Medium
- ☐ High
- ☐ N/A

### User Comments/Feedback

Write something...

### Was the resolution satisfactory?

- ☐ Yes
- ☐ No
- ☐ Partially

### Number of attempts to resolve issue

Enter a number...

## Continuous Improvement

Focuses on feedback collection and process adjustments to enhance end-user support.

### Summary of User Feedback Received

Write something...

### Average Resolution Time (Last Month)

Enter a number...

### Number of Escalations (Last Month)

Enter a number...

### Most Common Issue Category

- ☐ System Errors
- ☐ Data Entry
- ☐ Reporting
- ☐ Access Issues
- ☐ Training

### Date of Last Process Review

Enter date...

### Proposed Actions for Improvement

Write something...

### Areas for Training Enhancement

- ☐ Data Entry
- ☐ Reporting
- ☐ System Navigation
- ☐ Security Protocols

