✓ ChecklistGuro

ERP Localization Checklist

Language & Translation

Ensuring all system text, reports, and interfaces are properly localized.

Primary Languages Supported

☐ English

☐ Spanish

☐ French

☐ German

☐ Mandarin Chinese

☐ Japanese

Translation Method

☐ Machine Translation

☐ Human Translation

☐ Hybrid (Machine + Human)

Translation Style Guide Adherence Notes

Write something...

Glossary File Upload (if applicable)

⬆ Upload File

Last Translation Update Date

Enter date...

Quality Assurance Review Process

☐ Internal Review
☐ External Review
☐ Automated QA Tools

Currency & Tax Configuration

Accurate setup of currencies, tax rates, and reporting requirements for local regulations.

Default Currency Exchange Rate

Enter a number...

Default Currency

☐ USD
☐ EUR
☐ GBP
☐ JPY
☐ CAD

Tax Rate (VAT/GST)

Enter a number...

Tax Rate Effective Date

Enter date...

Tax Calculation Method Description

Write something...

Tax Reporting Frequency

☐ Monthly

☐ Quarterly

☐ Annually

Rounding Precision (Decimal Places)

Enter a number...

Legal & Regulatory Compliance

Verification of adherence to local laws regarding data privacy, accounting standards, and business practices.

Data Privacy Regulations Compliance (e.g., GDPR, CCPA)

☐ Fully Compliant

☐ Partially Compliant

☐ Not Compliant

Last Data Privacy Impact Assessment Date

Enter date...

Summary of Key Legal & Regulatory Considerations

Write something...

Number of Legal Hold Cases Currently Active

Enter a number...

Applicable Tax Regulations

☐ VAT

☐ Sales Tax

☐ Payroll Tax

☐ Withholding Tax

Relevant Legal Documentation (e.g., contracts, permits)

⬆ Upload File

Date & Number Formats

Correct formatting of dates, numbers, and units of measurement according to local conventions.

Default Date Format (e.g., DD/MM/YYYY)

Enter date...

Decimal Separator (e.g., . or ,)

Enter a number...

Thousands Separator (e.g., . or ,)

Enter a number...

First Day of the Week

☐ Sunday

☐ Monday

☐ Tuesday

☐ Wednesday

☐ Thursday

☐ Friday

☐ Saturday

Date Validation Format (for input)

Enter date...

Character Encoding

Proper encoding to support local character sets and languages.

Default Character Encoding

- [ ] UTF-8
- [ ] ISO-8859-1
- [ ] Windows-1252
- [ ] Other (Specify)

Specify other Encoding (if selected)

Write something...

Supported Character Sets

- [ ] Latin Extended-A
- [ ] Cyrillic
- [ ] Arabic
- [ ] Chinese (Simplified)
- [ ] Japanese
- [ ] Korean

Encoding for Data Imports

Write something...

Encoding for Email Notifications

Write something...

Address Formats & Postal Codes

Localization of address fields and postal code validation rules.

Standard Address Format Description

Write something...

Country Selection

- ☐ United States
- ☐ Canada
- ☐ United Kingdom
- ☐ Germany
- ☐ France
- ☐ Japan
- ☐ Australia

Specific Address Field Order (e.g., Street, City, State/Province)

Write something...

Maximum Postal Code Length

Enter a number...

Postal Code Validation Rules (Select all that apply)

- ☐ Numeric only
- ☐ Alphanumeric
- ☐ Format Check (e.g., XX-XXX)
- ☐ Range Check

Example Valid Postal Code Format

Write something...

Business Process Adaptation

Adjustments to ERP workflows to reflect local business practices.

Local Payment Method Integration

- [ ] Credit/Debit Cards
- [ ] Bank Transfers
- [ ] Mobile Payments
- [ ] Cash on Delivery

Describe any adaptations to the sales order process.

Write something...

Local Invoice Numbering Format (e.g., Prefix/Suffix)

Enter a number...

Date for Legal Hold/Retention Period Adjustments

Enter date...

Standard Operating Hours Adjustment Required?

☐ Yes

☐ No

Describe any changes needed to the inventory management process for local regulations.

Write something...

Reporting & Documentation

Localization of reports and user documentation.

Summary of Localization Changes in Reports

Write something...

Localized Report Templates

⬆ Upload File

Report Language Preference Setting

☐ English

☐ French

☐ German

☐ Spanish

Date of Last Report Localization Review

Enter date...

Documentation of Localized Report Formulas

Write something...

User Interface Customization

UI adjustments to enhance usability for local users.

Preferred Language Display

☐ English
☐ Local Language
☐ User Preference

Date Format Display

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

Number Format (Decimal Separator)

☐ Period (.)
☐ Comma (,)

Font Size Adjustment (Base)

Enter a number...

Customizable UI Elements

☐ Dashboard Widgets

☐ Navigation Menu

☐ Report Layout

Specific UI Modification Notes

Write something...

Testing & Validation

Comprehensive testing of localized functionality with local users.

Number of Test Users Involved

Enter a number...

Date of Initial Testing

Enter date...

Testing Environments Used (e.g., Dev, UAT)

☐ Development

☐ UAT

☐ Production

Summary of Key Testing Results

Write something...

Attach Test Scripts/Documentation

⬆ Upload File

Overall Test Outcome (Pass/Fail)

☐ Pass

☐ Fail

Date of Final Test Sign-off

Enter date...