



ERP Module Configuration Checklist

Module Requirements Gathering

Verify identified business needs and translate them into module configuration requirements.

Describe Overall Business Objectives for this Module

Write something...

List Key Business Processes the Module Supports

Write something...

Estimated Number of Users for this Module

Enter a number...

Primary Module User Group

- ☐ Sales
- ☐ Finance
- ☐ Operations
- ☐ HR
- ☐ Other

Date Requirements Gathering Completed

Enter date...

Which current systems/processes will this module replace?

- ☐ Legacy System A
- ☐ Spreadsheets
- ☐ Manual Processes
- ☐ None

User Roles & Permissions

Define and configure appropriate user roles and associated permissions within the module.

Module Access Level

- ☐ Read Only
- ☐ Basic Entry
- ☐ Full Access
- ☐ Admin

Functional Permissions

- ☐ Create
- ☐ Edit
- ☐ Delete
- ☐ Approve
- ☐ View

Approval Authority Level

- ☐ None
- ☐ Level 1
- ☐ Level 2
- ☐ Level 3

Role Description

Write something...

Transaction Limit

Enter a number...

Master Data Configuration

Configure and validate master data settings including item masters, vendor records, and customer profiles.

Starting Item Quantity

Enter a number...

Default Currency

- ☐ USD
- ☐ EUR
- ☐ GBP

Vendor Notes/Instructions

Write something...

Last Master Data Review Date

Enter date...

Applicable Tax Codes

- ☐ VAT
- ☐ GST
- ☐ Sales Tax

Default Payment Terms (Days)

Enter a number...

Workflow & Process Setup

Define and configure workflows and process automation rules within the module.

Approval Hierarchy

- ☐ Level 1 Approval
- ☐ Level 1 & 2 Approval
- ☐ Custom Approval Matrix

Approval Threshold (Currency)

Enter a number...

Automated Task Notifications

- ☐ Email
- ☐ In-App Notification
- ☐ SMS

Workflow Start Date (Scheduled)

Enter date...

Workflow Description (Purpose)

Write something...

Escalation Policy

- ☐ Automatic Escalation
- ☐ Manual Escalation
- ☐ No Escalation

Reporting & Analytics

Configure relevant reports and dashboards to track module performance and insights.

Default Report Format

- ☐ PDF
- ☐ CSV
- ☐ Excel

Report Refresh Interval (minutes)

Enter a number...

Key Performance Indicators (KPIs) to Track

- ☐ Sales Revenue
- ☐ Order Fulfillment Time
- ☐ Inventory Turnover
- ☐ Customer Satisfaction

Report Generation Start Date

Enter date...

Notes on Report Customization

Write something...

Integration Points

Verify and configure integration points with other ERP modules or external systems.

Connected ERP Module

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

API Endpoint URL

Write something...

Data Sync Frequency (hours)

Enter a number...

Data Mapping Description

Write something...

Data Transmission Method

- ☐ REST API
- ☐ Message Queue
- ☐ File Transfer

Integration Start Date

Enter date...

Data Validation Rules

Implement and test data validation rules to ensure data accuracy and consistency.

Minimum Quantity Allowed

Enter a number...

Maximum Quantity Allowed

Enter a number...

Price Must be Greater than

Enter a number...

Expiration Date Required

Enter date...

Status Selection

- ☐ Active
- ☐ Inactive
- ☐ Pending

Mandatory Field 1 (e.g. Customer ID)

Write something...

Allowed Categories

- ☐ Category A
- ☐ Category B
- ☐ Category C

Testing & Validation

Perform thorough testing of module configuration, including unit testing and user acceptance testing.

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 Test Results

Write something...

Affected Areas by Failed Test Cases

- ☐ Inventory Management
- ☐ Financials
- ☐ Sales
- ☐ Purchasing
- ☐ Manufacturing

Upload Test Results Documentation (e.g., logs, screenshots)

 Upload File

Date of Testing Completion

Enter date...

Documentation

Document all module configuration settings and procedures for future reference and maintenance.

Configuration Rationale

Write something...

Module Configuration Document

 Upload File

Date of Last Configuration Update

Enter date...

Version Number

Write something...

Known Limitations/Workarounds

Write something...

Configuration Approver Signature