



ERP Supply Chain Visibility & Integration Checklist 2026

Strategic Alignment & Scope Definition

Defining the boundaries of the supply chain network, key stakeholders, and the critical KPIs required for visibility success.

Project Scope Overview

Write something...

Included Supply Chain Nodes

- ☐ Raw Material Suppliers
- ☐ Manufacturing Plants
- ☐ Distribution Centers
- ☐ Third-Party Logistics (3PL)
- ☐ Retail/End-Customer Points

Project Implementation Deadline

Enter date...

Targeted Reduction in Lead Time (%)

Enter a number...

Business Requirements Document (BRD)

 Upload File

Stakeholder Approval

Multi-Tier Supplier Integration

Establishing seamless data exchange protocols and API connectivity with Tier 1, Tier 2, and Tier 3 suppliers.

Primary Supplier Name

Write something...

Supplier Tier Level

☐ Tier 1

☐ Tier 2

☐ Tier 3

Integration Methods Enabled

- ☐ EDI (Electronic Data Interchange)
- ☐ API/Webhooks
- ☐ SFTP/Flat File Transfer
- ☐ Manual Portal Entry
- ☐ AS2 Protocol

Integration Completion Date

Enter date...

Supplier API Documentation/Specs

 Upload File

Integration Issues & Mitigation Plan

Write something...

Real-Time Data Connectivity & IoT Integration

Verifying the integration of IoT sensors, GPS tracking, and automated telemetry into the ERP central dashboard.

Primary IoT Connectivity Protocol

- ☐ MQTT
- ☐
- ☐ LoRaWAN
- ☐ Zigbee
- ☐ Bluetooth Low Energy (BLE)

Integrated Sensor Types

- ☐ RFID Tags
- ☐ GPS Trackers
- ☐ Temperature/Humidity Sensors
- ☐ Barcode/QR Scanners
- ☐ Automated Weight Scales

IoT Gateway IP/Endpoint Address

Write something...

Data Polling Frequency (Minutes)

Enter a number...

Last Integration Connectivity Test Date

Enter date...

Sensor Configuration Documentation

 Upload File

Connectivity Issue Log & Resolution Notes

Write something...

Inventory Visibility & Tracking Accuracy

Ensuring end-to-end tracking of raw materials, work-in-progress (WIP), and finished goods across all warehouse locations.

Warehouse Location ID

- ☐ Primary Distribution Center
- ☐ Regional Hub A
- ☐ Satellite Warehouse
- ☐ Return Center

SKU / Part Number

Write something...

Physical Count Quantity

Enter a number...

Last Physical Audit Date

Enter date...

Discrepancy Root Causes

- ☐ Data Entry Error
- ☐ Damaged Goods
- ☐ Unrecorded Shrinkage
- ☐ Misplaced Unit
- ☐ System Sync Delay

Inventory Audit Photo/Document

 Upload File

Discrepancy Investigation Notes

Write something...

Inventory Controller Verification

Logistics & Distribution Monitoring

Integrating carrier data, freight management, and transit milestone updates to monitor outbound and inbound movement.

Monitored Distribution Channels

- ☐ Inbound Freight
- ☐
- ☐ Last-Mile Delivery
- ☐ Third-Party Logistics (3PL)
- ☐ Intermodal Transport

Last Logistics Audit Date

Enter date...

Target Delivery Lead Time (Days)

Enter a number...

Carrier Performance Notes

Write something...

Shipping Manifest & Bill of Lading (BoL)

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Logistics Manager Verification

Demand Forecasting & Replenishment Sync

Validating the synchronization between real-time sales orders, market demand signals, and automated procurement triggers.

Forecasting Method Used

- ☐ Moving Average
- ☐ Exponential Smoothing
- ☐ Machine Learning/AI-Driven
- ☐ Regression Analysis

Target Safety Stock Level

Enter a number...

Next Forecasting Cycle Review Date

Enter date...

Integrated Data Sources

- ☐ POS (Point of Sale) Systems
- ☐ Market Trend Analysis
- ☐ Historical Sales Records
- ☐ Seasonal Promotion Calendars

Replenishment Logic Documentation

Write something...

Demand Plan Approval Document

 Upload File

Risk Management & Exception Alerting

Setting up automated notifications for supply chain disruptions, lead-time delays, and stock-out risks.

Risk Severity Level

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

Risk Trigger Event

Write something...

Detection Date

Enter date...

Mitigation Action Plan

Write something...

Affected Supply Chain Nodes

- ☐ Raw Material Suppliers
- ☐ Manufacturing Plants
- ☐ Distribution Centers
- ☐ Logistics Partners
- ☐ End Customers

Incident Documentation/Evidence

 **Upload File**

Risk Manager Approval

Data Standardization & Master Data Integrity

Ensuring consistent SKU nomenclature, unit of measure (UOM) alignment, and unified part numbering across all integrated systems.

Data Cleansing Status

- ☐ Not Started
- ☐ In Progress
- ☐ Completed
- ☐ Requires Review

Standardized Data Fields Verified

- ☐ SKU/Part Number
- ☐ Unit of Measure (UOM)
- ☐ Vendor Master Data
- ☐ Material Descriptions
- ☐ Warehouse Bin Locations
- ☐ Lead Time Constants

Discrepancy Reference ID

Write something...

Data Cleansing Notes & Observations

Write something...

Last Master Data Audit Date

Enter date...

Data Mapping Documentation



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Data Steward Approval

Performance Analytics & Reporting

Developing automated dashboards for tracking Lead Time, Order Fulfillment Cycle Time, and Supplier On-Time Delivery (OTD).

Report Frequency

- ☐ Daily
- ☐ Weekly
- ☐ Monthly
- ☐ Quarterly

Key Performance Indicators (KPIs) to Track

- ☐ Order Fulfillment Cycle Time
- ☐ Supplier On-Time Delivery (OTD)
- ☐ Inventory Turnover Ratio
- ☐ Carrying Cost of Inventory
- ☐ Perfect Order Rate

Target Accuracy Threshold (%)

Last Report Audit Date

Enter date...

Monthly Performance Report PDF

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Discrepancy Analysis & Remediation Notes

Write something...

Security, Compliance & Audit Trails

Ensuring secure data transmission between partners and maintaining immutable logs of all supply chain transactions for 2026 compliance standards.

Security Protocols Verified

- ☐ End-to-End Encryption (E2EE) Active
- ☐ Multi-Factor Authentication (MFA) Enabled
- ☐ API Authentication & Token Management
- ☐ Data Masking for Sensitive Supplier Info

Compliance Framework Audit Standard

- ☐ ISO 27001
- ☐ SOC2 Type II
- ☐ GDPR / Data Privacy
- ☐ Internal Corporate Policy

Last Security Audit Completion Date

Enter date...

Audit Discrepancy Notes & Remediation Plan

Write something...

Upload Security Compliance Certificate



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Compliance Officer Authorization

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✓ Finish

🔧 Generate Sample Report