✅ ChecklistGuro

ERP User Acceptance Testing Checklist

Test Environment Setup

Verify the test environment mirrors the production environment and necessary test data is loaded.

Environment Name

Write something...

Environment Description

Write something...

RAM Allocated (GB)

Enter a number...

CPU Cores

Enter a number...

Environment Setup Date

Enter date...

Operating System

☐ Windows Server

☐ Linux

Environment Configuration File

⬆ Upload File

Functional Testing - Core Modules

Test critical business processes within modules like Finance, HR, Inventory, and Sales.

Sales Order Creation Quantity

Enter a number...

Invoice Due Date Verification

Enter date...

Payment Method Selection

☐ Credit Card

☐ Bank Transfer

☐ Cash

Order Notes/Comments Verification

Write something...

Inventory Quantity on Hand

Enter a number...

Tax Codes Applied (Select All)

☐ VAT

☐ Sales Tax

☐ GST

Scheduled Task Execution Time

Enter time...

Data Integrity Verification

Confirm data accuracy and consistency throughout the system after transactions.

Initial Quantity in Stock (Item A)

Enter a number...

Quantity After Transaction (Item A)

Enter a number...

Quantity Discrepancy Detected?

☐ Yes

☐ No

Discrepancy Amount (If Applicable)

Enter a number...

Discrepancy Description (If Applicable)

Write something...

Account Reconciliation Successful?

☐ Yes

☐ No

Transaction Date Verified

Enter date...

Integration Testing

Validate data flow and functionality between integrated modules and external systems.

Number of Transactions Processed

Enter a number...

Integration Tested (Yes/No)

☐ Yes

☐ No

Detailed Integration Test Results

Write something...

Error Messages Encountered?

☐ Yes

☐ No

Supporting Documentation (Logs, Screenshots)

⬆ Upload File

Data Reconciliation Difference (if any)

Enter a number...

Reporting & Analytics Validation

Ensure reports are accurate, accessible, and meet business requirements.

Report Run Time (seconds)

Enter a number...

Report Accuracy Verification Method

☐ Manual Comparison

☐ Automated Data Reconciliation

☐ Third-Party Validation

Report Output Review Comments

Write something...

Report Validation Date

Enter date...

Report Data Sources Verified

- ☐ Database
- ☐ API
- ☐ Flat File

Number of Records Processed

Enter a number...

Security & Access Control Testing

Verify user roles and permissions are correctly configured and enforced.

Verify User Role Assignment

- ☐ Correct
- ☐ Incorrect
- ☐ N/A

Confirm Password Complexity Policy Enforcement

☐ Enforced

☐ Not Enforced

☐ N/A

Verify Account Lockout Threshold (Failed Login Attempts)

Enter a number...

Confirm Two-Factor Authentication (2FA) Implementation

☐ Enabled

☐ Disabled

☐ N/A

Describe any detected Access Control Anomalies

Write something...

Validate Sensitivity of Data Access Permissions

☐ Appropriate

☐ Too Permissive

☐ Too Restrictive

Workflow & Approvals Testing

Test all workflows and approval processes to ensure they function as intended.

Workflow Initiated Successfully?

☐ Yes

☐ No

☐ Not Applicable

Approver Notified?

☐ Yes

☐ No

☐ N/A

Approval Start Date

Enter date...

Approval Completion Date

Enter date...

Approval Route Deviation Count

Enter a number...

Workflow Comments/Notes

Write something...

Approval Rules Applied Correctly?

☐ Yes

☐ No

☐ N/A

Tester Signature

_____

User Interface (UI) & Usability Testing

Assess the ease of use and overall user experience of the ERP system.

Navigation Menu Clarity

Write something...

Overall UI Aesthetics & Visual Appeal Feedback

Write something...

Average Time to Complete Key Task (minutes)

Enter a number...

Ease of Finding Information

- [ ] Very Easy
- [ ] Easy
- [ ] Neutral
- [ ] Difficult
- [ ] Very Difficult

Which UI elements are confusing or require improvement?

- [ ] Buttons
- [ ] Forms
- [ ] Tables
- [ ] Reports
- [ ] Search Functionality

Suggestions for UI Improvements

Write something...

Mobile Accessibility Validation

If applicable, test functionality and usability on mobile devices.

Device Type Tested

- [ ] iOS Smartphone
- [ ] Android Smartphone
- [ ] iOS Tablet
- [ ] Android Tablet

Screen Resolution (Width)

Enter a number...

Screen Resolution (Height)

Enter a number...

Network Connectivity

☐ Wi-Fi

☐ 4G/LTE

☐ Simulated Slow Network

Observed Issues/Bugs

Write something...

Overall Mobile Usability

☐ Excellent

☐ Good

☐ Fair

☐ Poor

Error Handling & System Recovery

Test error messages, system notifications, and recovery procedures.

Describe a common error encountered during testing.

Write something...

Document steps to reproduce the error.

Write something...

Error code (if applicable)

Enter a number...

Date/Time Error occurred

Enter date...

Describe the system's response to the error.

Write something...

Impacted areas

- [ ] Finance
- [ ] Inventory
- [ ] Sales
- [ ] HR
- [ ] Other

Recovery steps performed (if any)

Write something...

Tester Signature