✅ ChecklistGuro

Transportation Management System (TMS) Integration Checklist

Project Initiation & Planning

Activities related to defining scope, goals, and initial planning for the TMS integration.

Define Integration Goals & Objectives

Write something...

Estimated Project Budget

Enter a number...

Project Start Date

Enter date...

Target Go-Live Date

Enter date...

TMS Vendor Selected?

☐ Yes

☐ No

Key Stakeholders Involved

- ☐ Logistics Team
- ☐ IT Department
- ☐ Finance Department
- ☐ Sales Team
- ☐ Procurement

Project Manager Name

Write something...

Initial Risk Assessment & Mitigation Plan Outline

Write something...

Data Mapping & Transformation

Focuses on aligning data between the existing systems and the TMS.

Identify Key Data Entities to Map (e.g., Orders, Shipments, Carriers)

- ☐ Orders
- ☐ Shipments
- ☐ Carriers
- ☐ Products
- ☐ Locations

Document Data Field Mappings (Source Field -> TMS Field)

Write something...

Determine Data Transformation Rules (e.g., Unit Conversions, Formatting)

- ☐ Unit Conversions (e.g., Weight, Volume)
- ☐ Date/Time Formatting
- ☐ Address Standardization
- ☐ Currency Conversion
- ☐ Code Mapping (e.g., Country Codes)

Define Data Validation Rules (e.g., Minimum/Maximum Values, Required Fields)

Enter a number...

Describe Error Handling Procedures for Data Transformation Failures

Write something...

Data Cleansing Requirements?

- ☐ Yes
- ☐ No

Document Data Encryption Requirements (if applicable)

Write something...

System Configuration & Setup

Covers the configuration of the TMS and associated systems.

Select TMS Edition

☐ Standard

☐ Professional

☐ Enterprise

Number of Users (Initial)

Enter a number...

Default Currency

☐ USD

☐ EUR

☐ GBP

☐ CAD

Custom Configuration Notes

Write something...

Preferred Carrier Selection Method

☐ Rate Shopping

☐ Manual Assignment

☐ Pre-Defined Routes

Implementation Start Date

Enter date...

Default Shipment Type

☐ Full Truckload (FTL)

☐ Less-than-Truckload (LTL)

☐ Parcel

Integration Development & Testing

Details the build and testing phases of the integration itself.

API Call Success Rate (Initial)

Enter a number...

Data Sync Latency (Seconds)

Enter a number...

Data Validation Checks Performed

☐ Shipment Status Updates

☐ Carrier Rate Verification

☐ Address Validation

☐ Weight and Dimensions Accuracy

☐ Bill of Lading (BOL) Validation

Detailed Description of Unit Testing Results

Write something...

UAT Test Scripts

⬆ Upload File

Date of Integration Build Complete

Enter date...

Defect Log & Resolution Summary (Integration)

Write something...

Integration Environment (DEV/UAT/PROD)

☐ DEV

☐ UAT

☐ PROD

User Training & Documentation

Covers training users and creating necessary documentation for the new system.

Training Material Review & Approval

Write something...

Training Modules Completed (Select all that apply)

- ☐ TMS Interface Navigation
- ☐ Shipment Creation
- ☐ Rate Management
- ☐ Reporting & Analytics
- ☐ Exception Handling

Number of Users Trained

Enter a number...

Date of Training Session

Enter date...

Feedback from Training Sessions (Summarize key points)

Write something...

Upload Training Attendance Records

⬆ Upload File

User Role Confirmation (Verification that users are aware of their roles within the TMS)

☐ Confirmed

☐ Pending

Go-Live & Post-Implementation Support

Activities surrounding the launch and ongoing support for the integrated TMS.

Go-Live Date

Enter date...

Number of Critical Issues Reported in First 24 Hours

Enter a number...

Go-Live Success Status

☐ Successful

☐ Partially Successful

☐ Unsuccessful

Summary of Initial Post-Go-Live Issues & Resolutions

Write something...

Modules Requiring Additional Monitoring

☐ Order Management

☐ Rate Shopping

☐ Carrier Communication

☐ Reporting

☐ Dispatch

User Satisfaction (Post Go-Live)

☐ Very Satisfied

☐ Satisfied

☐ Neutral

☐ Dissatisfied

☐ Very Dissatisfied

Date of First Post-Implementation Review Meeting

Enter date...

Summary of Action Items from First Post-Implementation Review Meeting

Write something...