



Warehouse WMS Implementation Checklist

Project Planning & Scope Definition

Ensuring clear goals, scope, and resource allocation for the WMS implementation.

Project Goals and Objectives

Write something...

Defined Project Scope (Inclusions & Exclusions)

Write something...

Estimated Project Budget

Enter a number...

Project Start Date

Enter date...

Projected Go-Live Date

Implementation Methodology (Agile, Waterfall, Hybrid)

- ☐ Agile
- ☐ Waterfall
- ☐ Hybrid

Key Stakeholders Involved

- ☐ Warehouse Manager
- ☐ IT Department
- ☐ Finance Department
- ☐ Logistics Team

Hardware & Infrastructure Readiness

Verifying network, servers, mobile devices, and other hardware are ready for WMS deployment.

Server CPU Cores

Server RAM (GB)

Network Bandwidth (Mbps)

Enter a number...

Network Connectivity (Wired/Wireless)


☐ Wired

☐ Wireless

Last Server Patching Date

Enter date...

Network Diagram (Optional)

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Firewall Status (Enabled/Disabled)

☐ Enabled

☐ Disabled

Software Installation & Configuration

Confirming correct WMS software installation, module setup, and system parameters.

WMS Software Version Installed

Enter a number...

Database Type

- ☐ MySQL
- ☐ SQL Server
- ☐ PostgreSQL
- ☐ Oracle

Detailed Configuration Notes (e.g., server settings, port numbers)

Write something...

License Type

- ☐ Subscription
- ☐ Perpetual

Software Installation Date

Enter date...

Modules Installed

- ☐ Receiving
- ☐ Putaway
- ☐ Inventory Management
- ☐ Picking
- ☐ Packing
- ☐ Shipping

Any Customization Details?

Write something...

Data Migration & Validation

Validating data accuracy and completeness during migration from legacy systems.

Number of Records Migrated

Enter a number...

Summary of Data Cleansing Actions Performed

Write something...

Data Migration Method

- ☐ Automated Script
- ☐ Manual Import
- ☐ Hybrid Approach

Number of Data Validation Errors Found

Enter a number...

Description of Error Handling Process

Write something...

Date of Initial Data Migration

Enter date...

Data Validation Checks Performed

- ☐ Completeness
- ☐ Accuracy
- ☐ Duplication
- ☐ Format Validation

Sample Data Validation Report

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Integration with Existing Systems

Testing and verifying data flow between WMS and other enterprise systems (ERP, TMS, etc.).

ERP System Integrated?

- ☐ Yes
- ☐ No
- ☐ Planning

TMS System Integrated?

- ☐ Yes
- ☐ No
- ☐ Planning

Data Sync Frequency (hours)

Enter a number...

Describe Data Mapping Process

Write something...

Integration Method Used?

- ☐ API
- ☐ Flat File
- ☐ Other

Note any integration errors encountered

Write something...

Last Integration Validation Date

Enter date...

User Training & Documentation

Ensuring users are properly trained and have access to necessary documentation.

Number of Users Trained

Training Program Outline Summary

Training Materials (e.g., Manuals, Presentations)

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Modules Covered in Training (Select All That Apply)

- ☐ Receiving
- ☐ Putaway
- ☐ Picking
- ☐ Packing
- ☐ Shipping
- ☐ Inventory Management
- ☐ Reporting

Date of Last Training Session

Feedback from Trainees (Summary)

Write something...

Training Delivery Method

- ☐ In-Person
- ☐ Online Webinar
- ☐ Self-Paced Online Modules

Testing & Quality Assurance

Executing test scripts and addressing identified issues before go-live.

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 Critical Failures

Write something...

Modules Tested

- ☐ Receiving
- ☐ Putaway
- ☐ Picking
- ☐ Packing
- ☐ Shipping
- ☐ Inventory Management

Date of Last Test Run

Enter date...

Description of Defects Found (if any)

Write something...

Overall Testing Status

- ☐ Not Started
- ☐ In Progress
- ☐ Completed
- ☐ Blocked

Go-Live & Post-Implementation Support

Planning and executing the go-live process and providing ongoing support.

Go-Live Date

Enter date...

Go-Live Start Time

Enter time...

Go-Live Notes & Observations

Write something...

Critical Incident Count (First 24 Hours)

Enter a number...

Post-Go-Live Support Escalation Routes

- ☐ Level 1 Support
- ☐ Level 1.5 Support
- ☐ Level 2 Support
- ☐ Vendor Support

First Post-Go-Live Review Date

Enter date...

Summary of Post-Go-Live Issues & Resolutions

Write something...

Post-Go-Live Acceptance Signature

Security & Access Control

Confirming proper user authentication, authorization, and data security protocols.

Authentication Method

- ☐ Username/Password
- ☐ Multi-Factor Authentication (MFA)
- ☐ Single Sign-On (SSO)

Maximum Login Attempts

Enter a number...

Last Password Reset Audit Date

Enter date...

Role-Based Access Restrictions

- ☐ Inventory Management
- ☐ Order Processing
- ☐ Shipping & Receiving
- ☐ System Administration

Detailed Security Audit Notes

Write something...

Data Encryption Status

- ☐ At Rest
- ☐ In Transit
- ☐ Both

Compliance & Regulatory Checks

Verifying adherence to relevant industry regulations and compliance requirements.

Relevant Regulations (e.g., FDA, Hazmat)

- ☐ FDA (Food and Drug Administration)
- ☐ Hazmat (Hazardous Materials Regulations)
- ☐ OSHA (Occupational Safety and Health Administration)
- ☐ ISO 9001
- ☐ Other (Specify)

Summary of Compliance Requirements

Write something...

Last Compliance Audit Date

Enter date...

Audit Score (if applicable)

Enter a number...

Relevant Security Standards

- ☐ PCI DSS
- ☐ HIPAA
- ☐ SOC 2
- ☐ GDPR
- ☐ None

Description of any identified non-conformities

Write something...

Supporting Documentation (e.g., Audit Reports, Certificates)

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