



Warehouse WMS Integration Checklist

Project Planning & Scope Definition

Initial planning and defining the scope of the WMS integration project.

Project Goals & Objectives

Write something...

Estimated Project Budget

Enter a number...

Project Start Date

Enter date...

Projected Completion Date

Enter date...

Integration Approach (Big Bang vs. Phased)

☐ Big Bang

☐ Phased

Scope Inclusions (Specific systems/modules)

Write something...

Scope Exclusions (What's not included)

Write something...

Data Mapping & Transformation

Mapping data fields between systems and defining transformation rules.

Source System Field Name

Write something...

WMS Target Field Name

Write something...

Data Type Conversion Factor (if applicable)

Enter a number...

Data Transformation Required?

☐ Yes

☐ No

Description of Transformation Logic (if applicable)

Write something...

Data Validation Rules Applied?

☐ Yes

☐ No

Description of Data Validation Rules

Write something...

Data Mapping Document (e.g., Excel)

 Upload File

System Connectivity & APIs

Verifying connections, APIs, and data transfer protocols.

API Version Number

Enter a number...

Connectivity Method

- ☐ REST API
- ☐ Message Queue (e.g., RabbitMQ)
- ☐ Direct Database Connection

API Endpoint URL

Write something...

Port Number

Enter a number...

Authentication Method (e.g., API Key, OAuth)

Write something...

Last Connectivity Test Date

Enter date...

Encryption Protocol (if applicable)

- ☐ TLS 1.2
- ☐ TLS 1.3
- ☐ None

User Access & Permissions

Setting up user accounts, roles, and permissions within both the WMS and integrated systems.

WMS User Role

- ☐ Administrator
- ☐ Warehouse Manager
- ☐ Picker
- ☐ Packer
- ☐ Receiver

Maximum Order Quantity Allowed

Enter a number...

Authorized System Access (select all that apply)

- ☐ Inventory Management
- ☐ Order Processing
- ☐ Reporting Dashboard
- ☐ Shipping Module

Access Review Date

Enter date...

Special Access Notes/Justification

Write something...

Two-Factor Authentication Enabled?

- ☐ Yes
- ☐ No

Testing & Validation

Comprehensive testing of data flow and functionality across all integrated systems.

Number of Successful Data Transfers

Enter a number...

Integration Order Status (Successful, Partial, Failed)

- ☐ Successful
- ☐ Partial
- ☐ Failed

Detailed Error Log Description (if applicable)

Write something...

Number of Discrepancies Found

Enter a number...

Date of Last Successful Integration Run

Enter date...

Functional Areas Tested (Receiving, Picking, Shipping, Inventory)

- ☐ Receiving
- ☐ Picking
- ☐ Shipping
- ☐ Inventory

Overall Test Result (Pass, Fail, Blocked)

- ☐ Pass
- ☐ Fail
- ☐ Blocked

Training & Documentation

Ensuring users are trained on new processes and documentation is available.

Number of Users Trained

Summary of Training Content

Training Materials (PDF, PPT)

[Upload File](#)

Date of Last Training Session

Enter date...

Topics Covered in Training

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

Name of Trainer

Write something...

Feedback from Training Sessions

Write something...

Go-Live & Support

Planning for the go-live process and post-implementation support.

Planned Go-Live Date

Enter date...

Planned Go-Live Time

Enter time...

Number of Support Staff On-Site

Enter a number...

Escalation Contact Information

Write something...

Go-Live Readiness Status

- ☐ Ready
- ☐ Conditional
- ☐ Not Ready

Go-Live Checklist Sign-Off Document

 Upload File

Security & Compliance

Reviewing security measures and ensuring compliance with relevant regulations.

Encryption Strength (bits)

Enter a number...

Data Transmission Protocol

- ☐ HTTPS
- ☐ SFTP
- ☐ Other (Specify in Long Text)

Detailed Description of Security Measures

Write something...

Last Security Audit Date

Enter date...

Compliance Standards Met

- ☐ GDPR
- ☐ CCPA
- ☐ HIPAA
- ☐ ISO 27001
- ☐ Other (Specify in Long Text)

Security Policy Document

 Upload File

Data Retention Policy Description

Write something...

