The Ultimate ERP Integration Checklist

- [ ] **Develop an integration plan**
  - [ ] Determine your budget
  - [ ] Designate a team member with a high-level view of business goals and internal processes to lead the project
  - [ ] Determine your business requirements:
    - [ ] The goal of integrating your store with an ERP system
    - [ ] The key information the store needs to communicate with an ERP system and vice versa
    - [ ] The current gaps in inventory data
  - [ ] Determine what processes, data, and systems your intelligent ERP system will need to automate:
    - [ ] Customer data management
    - [ ] Order information
    - [ ] Shipping details
    - [ ] Accounting systems
    - [ ] Inventory management
    - [ ] Purchase orders
    - [ ] Product and price updates
    - [ ] Warehouse management
    - [ ] 3PL
    - [ ] Customer relationship management CRM
    - [ ] Business intelligence
    - [ ] Human resources
    - [ ] Project management
- [ ] **Keep employees, partners, and vendors informed about the integration status and any changes to existing processes and workflows**
- [ ] **Practice clean and organized data management**
  - [ ] Update and standardize data formats
  - [ ] Routinely validate data
  - [ ] Clean up data sets, e.g., remove duplicates
  - [ ] Review various team members' access to different data
- [ ] **Make sure your ERP integration has no unsecured connections**