ERP change decision checklist

Record the evidence, name an owner and agree the next action.

Organisation: _____ Owner: _____

System / workflow: _____ Review date: _____

- [ ] Name the operational gap and its process owner.
- [ ] Separate statutory accounting needs from workflow requirements.
- [ ] Document current ERP version, licences and supported interfaces.
- [ ] Compare configuration, extension and a focused application.
- [ ] List records and fields owned by each system.
- [ ] Test one normal journey and one rejected request.
- [ ] Agree migration totals and reconciliation checks.
- [ ] Record access roles, approval limits and export permissions.
- [ ] Assign deployment, fallback and support responsibilities.
- [ ] Obtain written scope, acceptance checks and commercial terms.

Evidence / decisions / next actions

Read the guide and check the references before using this worksheet:
dyaustechnoservices.com/custom-erp-or-extend-existing-erp/

Updated 19 October 2026 | hi@dyaustechnoservices.com | +91 96000 51433
Ashtalakshmi Nagar, Alapakkam, Porur, Chennai 600116 | Alternate: +91 95661 60793