ERP and CRM ownership checklist

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

Organisation: _____ Owner: _____

System / workflow: _____ Review date: _____

- [ ] Identify the owner of each record and field.
- [ ] Record shared identifiers and matching rules.
- [ ] Distinguish proposed changes from approved values.
- [ ] Agree create, update and delete authority.
- [ ] Record supported APIs and vendor permissions.
- [ ] Test repeated delivery without duplicate records.
- [ ] Test conflicting and out-of-order updates.
- [ ] Set bounded retries and an accountable exception owner.
- [ ] Reconcile source and destination records.
- [ ] Retain useful history without unnecessary confidential data.

Evidence / decisions / next actions

Read the guide and check the references before using this worksheet:
dyaustechnoservices.com/erp-crm-integration-record-ownership/

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