Odoo Implementation Checklist

From planning to go-live · 2026

iVentureTeam

Work each phase in order, tick every task, and do not launch until the go-live readiness gate is all green. Adapt the depth to your size and industry.

1 Planning & discovery

- [ ] Measurable goals documented (not just features)
- [ ] One accountable decision-maker named
- [ ] Process owner per area (sales, purchase, inventory, accounting)
- [ ] Scope and exclusions written; change process agreed
- [ ] Budget with buffer and a realistic timeline
- [ ] Go/no-go criteria defined up front

2 Design & configuration

- [ ] Phase-1 core modules chosen (biggest pain first)
- [ ] Company structure, CoA, warehouses, categories set
- [ ] Each configuration mapped to a requirement
- [ ] Customizations justified; standard, upgrade-safe first
- [ ] Trusted third-party / OCA modules evaluated
- [ ] Number sequences and fiscal year set, with lock dates

3 Security & permissions

- [ ] Role matrix built (least privilege)
- [ ] Segregation of duties enforced (post vs approve)
- [ ] Record rules configured
- [ ] Two-factor authentication and password policy on
- [ ] Default admin and demo accounts secured
- [ ] API keys scoped to least access and rotated

4 Tax & compliance (GST / VAT)

- [ ] GSTIN entered; India fiscal localization enabled
- [ ] GST tax groups/rates; HSN or SAC on every product
- [ ] e-invoice (IRN/QR) and e-way bill set up
- [ ] TDS and TCS configured where they apply
- [ ] GSTR-1 and GSTR-3B mapped; fiscal positions set
- [ ] Place-of-supply logic verified

5 Data migration & validation

- [ ] Every source inventoried (including spreadsheets)
- [ ] Master vs transactional/historical separated
- [ ] Data cleaned, standardized, deduplicated
- [ ] At least two test migrations run
- [ ] Record counts, control totals, integrity validated
- [ ] Finance signed off opening balances

6 Testing & UAT

- [ ] Modules and end-to-end flows tested
- [ ] Edge cases covered (returns, partials, multi-currency)
- [ ] Integrations tested (two-way sync, dedupe, retry)
- [ ] Cross-system figures reconciled
- [ ] Permission audit passed
- [ ] Real-user UAT sign-off (finance, warehouse, sales)

7 Training & change management

- [ ] Role-based training 5–10 days before go-live
- [ ] Quick references and in-app help provided
- [ ] Power users and champions trained
- [ ] Company-wide comms sent
- [ ] Baseline metrics captured
- [ ] Early feedback and resistance addressed

8 Go-live & cutover

- [ ] Full dress rehearsal on a copy of production
- [ ] Old system frozen at a set time
- [ ] Final migration and reconcile
- [ ] Backup restored to sandbox; rollback defined
- [ ] Cutover plan for open orders, balances, stock
- [ ] Day-one war room ready (roster, escalation)

✓ Go-live readiness gate (all green to launch)

- [ ] Data validated, opening balances signed off — Finance
- [ ] Core processes pass UAT — Operations
- [ ] Security and permissions set and audited — IT
- [ ] Tax and GST correct on test invoices — Finance
- [ ] Backup and rollback tested — IT
- [ ] Training done, day-one support staffed — Project lead

9 Post go-live

- [ ] Hypercare for two to four weeks
- [ ] Monitor performance and KPIs vs baseline
- [ ] Track adoption; fix friction
- [ ] Enhancement backlog maintained
- [ ] 30, 60, 90-day reviews held
- [ ] Ongoing support and upgrade plan set

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