Acumatica Release-Readiness Checklist

If you want Acumatica release-readiness to be actionable and measurable, you need a clear checkpoint before and after R1 or R2 goes live. This checklist converts ERP release preparation into practical actions. It is simple by design. Check these boxes confidently, and you're on track to be release-ready.

Pre-Release Alignment

- High-impact workflows are identified for finance, operations, approvals, and reporting.
- Workflow changes are mapped to specific roles, not just features.
- Users are segmented by responsibility and system usage frequency.
- Non-relevant feature updates are filtered out for each group.
- Ensure that Acumatica user training is focused on impact, not noise.

Training and Enablement

- Task-based guidance is created for affected workflows.
- Before and after execution differences are clearly documented.
- Support content is searchable and tied to real tasks.
- Guidance reflects the Acumatica 2026 version before go-live.
- ERP change management is aligned with execution reality.

Go-Live Support

- Contextual reminders are prepared for modified screens or workflows.
- Support teams are trained on the same guidance provided to users.
- Escalation paths for high-risk workflows are clearly defined.
- Communication is short, role-specific, and timed to user actions.
- Friction is reduced during R1 or R2 transition windows.

Post-Release Adoption Monitoring

- Approval cycle times are reviewed for unexpected delays.
- Error rates are tracked during the first weeks after deployment.
- Support ticket patterns are analyzed for recurring confusion.
- Adjustments to guidance are made quickly where friction appears.
- Validate real Acumatica end-user adoption.

When this checklist is used consistently for every R1 and R2 cycle from Acumatica, ERP release preparation becomes structured and repeatable.

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