Single Shipment Record Design Checklist

Work through it with the owner of each spreadsheet before development begins, and tick an item only when it is written down.

SITE _____ DATE _____ COMPLETED BY _____

01 Data And Sources

- [ ] List every spreadsheet and system that holds shipment data
- [ ] Name the owner of each field and which copy wins in a conflict
- [ ] Mark the columns kept only because another copy is not trusted

02 Legacy System Integration

- [ ] Confirm what the TMS allows other software to read and write
- [ ] Agree the integration route in the feasibility assessment
- [ ] Decide what happens when the TMS and the record disagree

03 Roles And Permissions

- [ ] Define what sales, operations and finance may see and change
- [ ] Name who approves a change to an agreed rate
- [ ] Confirm the audit trail records who changed what and when

04 Records And Retention

- [ ] List the customs record duties for each lane, including the UK's 3 years
- [ ] Confirm records can be searched and exported for a customs request

- [ ] Plan how old spreadsheet records are cleaned and migrated

05 Hosting And Security

- [ ] Decide where the server runs and who maintains it
- [ ] Check data protection duties for customer contact details
- [ ] Agree source code ownership in writing before work starts

06 Measurement After Go-Live

- [ ] Time entries per shipment before and after go-live
- [ ] Count shipments each week
- [ ] Log corrections made after billing