

ODOO UPGRADE CHECKLIST

PRE-UPGRADE PLANNING

- ☐ Assess Business Needs: Determine why the upgrade is necessary and identify the features you need in the new version.
- ☐ Review Current Setup: Document current Odoo version, customisations, and integrations.
- ☐ Check Compatibility: Verify compatibility of custom modules, third-party apps, and integrations with the new version.
- ☐ Review Odoo Roadmap: Understand changes and improvements in the new version.
- ☐ Back-Up Data: Create a full backup of your Odoo database and system files.



UPGRADE PREPARATION

- ☐ Test in a Staging Environment: Set up a testing environment to simulate the upgrade process without affecting live operations.
- ☐ Upgrade Customisations: Update or refactor custom modules for compatibility with the new version.
- ☐ Data Integrity Check: Validate the integrity of data during the migration process.
- ☐ Plan Downtime: Schedule the upgrade for a low-traffic or off-peak period to minimise disruptions.

POST-UPGRADE

- ☐ Monitor System Performance: Continuously monitor for issues or bugs after the upgrade.
- ☐ Update Documentation: Revise internal documentation to reflect changes in processes or features.
- ☐ Leverage New Features: Explore and implement new tools or enhancements that can improve operations.

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EXECUTION

- ☐ Run the Upgrade Tool: Use Odoo's official upgrade scripts or tools to transition the system to the new version.
- ☐ Perform Post-Upgrade Tests: Test all critical processes, including workflows, integrations, and reporting, to ensure functionality.
- ☐ Train Staff: Provide training on new features and interface changes.

SUPPORT & MAINTENANCE

- ☐ Engage Support Teams: Ensure your support plan covers post-upgrade assistance for troubleshooting.
- ☐ Regular Updates: Keep your system updated with minor version updates and patches.

