



# PRODUCTIVITY NERD

## VALIDATION CHECKLIST FOR NEW CLICKUP WORKFLOW

Below is a checklist to have handy while you test your ClickUp workflow. Document any feedback and we'll use it as the agenda for the Validation meeting.

### 1. Pre-UAT (User Acceptance Testing) Setup

- ☐ Ensure all testers have access to ClickUp
- ☐ For initial testing, have the implementation team perform the testing
- ☐ Once the workflow has been refined, select a diverse group of end-users to perform final testing before launch

### 2. Functional Testing

- ☐ Test the creation of tasks within the new workflow
- ☐ Validate that task assignments to team members function as intended
- ☐ Apply templates, if applicable
- ☐ Confirm automations are trigger as intended
- ☐ Check if due dates can be set and altered within tasks
- ☐ Verify subtask creation and management
- ☐ Do custom fields contain all relevant information (dropdowns and labels)
- ☐ Are any other custom fields needed?
- ☐ Confirm notifications are working when tasks/subtasks are updated
- ☐ Assess the workflow status updates and ensure they reflect accurately in real time
- ☐ Evaluate the filtering, sorting, and searching capabilities within the workflow
- ☐ Perform attachment uploads and verify if they are correctly linked to the relevant tasks

### 3. User Acceptance

- ☐ Collect feedback from users on the usability of the workflow
- ☐ Ask users to document any issues or bugs encountered
- ☐ Request suggestions for improvements or additional features needed
- ☐ Prioritize issues/feedback