

Software Acceptance Protocol (Template)

A software acceptance form and 15 things to test before you sign. Sign only what you have tried yourself, on your own data.

This is a template, not legal advice. If your contract with the vendor defines acceptance differently, the contract wins. Ask a lawyer about anything disputed.

For owners, operations leads and founders whose vendor just said: “It’s done, please sign the protocol.” The signature often decides payment, the start of the warranty and who pays for fixes. Your contract says exactly what.

A demo on prepared data always works. That is why it makes sense to sign only after a test on your real data, with the people who will use the system every day.

Part A: What to test before you sign

Data

- ☐ **1. Test on real data.** On a copy of your real records, not on the vendor’s demo data.
- ☐ **2. The migration adds up.** The number of customers, orders or invoices is the same before and after. Check five random records in detail too.
- ☐ **3. Edge cases from your daily work.** A cancellation, a credit note, a customer with two addresses, accents in a name, a large attachment.

People and access

- ☐ **4. Each role sees only what it should.** Log in as a normal user, not as an admin.
- ☐ **5. Adding and removing a user works.** A removed person can no longer log in.
- ☐ **6. The main admin account belongs to your company,** not to the vendor.

Processes

- ☐ **7. The whole process end to end** is run by the person who does it daily. Without the vendor’s help.
- ☐ **8. Bad input.** What happens with a missing field, a wrong format or a double click?

- ☐ **9. Emails, notifications and exports** reach the right person in the right form.
- ☐ **10. Connections to your systems** (accounting, e-shop, warehouse) work on the real connection or a copy of it, not only in test mode.

Operations

- ☐ **11. Backups exist and a restore has been tried.** “We back up” is not enough. Ask for the date of the last restore test.
- ☐ **12. Speed with your volume of data.** An empty system is always fast.
- ☐ **13. The devices people actually use.** A phone in the warehouse, an older laptop, a weak signal.

Handover

- ☐ **14. Code, domains, hosting and service accounts are in your name.** A repository on your account, not just a zip file.
- ☐ **15. Documentation:** how to run the system, where the logs are, whom to call when it is down.

Write every point that failed into the defect list in Part B. Do not sign “without reservations” just so the project finally ends.

Part B: Acceptance protocol

Basic details

Project	[project name]
Client	[company, company ID]
Vendor	[company, company ID]
Contract	[number, dated]
Version / release	[version number, deployment date]
Environment	[live operation / test environment, address]
Testing	from [date] to [date]
Tested by	[names, roles]

Scope delivered

#	Feature or requirement (from the brief)	Delivered (yes / partly / no)	Note
1			
2			
3			
4			
5			

Test scenarios

#	Scenario	Data (real / copy / test)	Tested by	Result (pass / fail)	Note
1					
2					
3					
4					
5					
6					

Defect list

Severity: **A critical** = a main process does not work and there is no workaround. **B major** = works with a workaround or extra effort. **C minor** = looks, text, convenience.

#	Defect description	Severity (A / B / C)	Fix by	Status
1				
2				
3				
4				

Handed over

- ☐ Access to the code repository on the client's account
- ☐ Access to hosting, domains and third-party services
- ☐ Documentation (running, operations, backups)
- ☐ Data export in a readable format (CSV, Excel or a database backup)

Acceptance result

- ☐ **Accepted without reservations.**
- ☐ **Accepted with reservations.** The vendor fixes the B and C defects on the list by [date]. No A defect.
- ☐ **Not accepted.** The list contains an A defect. New acceptance date: [date].

The rule we recommend: an A defect means not accepted. A reservation without a fix date is not a reservation.

Signatures

	For the client	For the vendor
Name		
Role		
Date		
Signature		

How we do it

Code, data and infrastructure belong to the client from day one, not only after the protocol is signed.

Your vendor wants a signature and you are not sure?

Send us the filled-in protocol and defect list without personal data at info@digitaliko.com and we will give you our opinion for free: what we would still check before signing. Or book 15 minutes with Filip:

www.digitaliko.com/contact

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