

FREE · BILINGUAL EXECUTIVE TOOL

Brazil Localization Readiness Checklist

Assess whether your global ERP template is truly ready for Brazil.
Avalie se o seu template global de ERP esta realmente preparado para o Brasil.

35

readiness controls
controles de prontidao

7

critical workstreams
frentes criticas

RV.BR GLOBAL ERP

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How to use this checklist

Como utilizar este checklist

Use one status for each control. The objective is not to obtain a perfect score on day one; it is to expose dependencies before they become UAT, cutover or go-live failures.

Utilize um status para cada controle. O objetivo não é obter uma pontuação perfeita no primeiro dia, mas revelar dependências antes que se tornem falhas de UAT, cutover ou go-live.

R - Ready	Configured, tested, reconciled and accepted. Configurado, testado, conciliado e aceito.
P - Partially ready	Some evidence exists, but work or validation remains. Existem evidências, mas ainda há trabalho ou validação pendente.
N - Not ready	Required capability, setup, information or evidence is missing. Funcionalidade, configuração, informação ou evidência necessária está ausente.
N/A	Not applicable to the approved business scope. Não aplicável ao escopo de negócio aprovado.

Scoring / Pontuação

Ready = 2 points · Partially ready = 1 point · Not ready = 0 points. Exclude N/A items. Readiness % = points achieved / maximum applicable points.

Ready = 2 pontos · Partially ready = 1 ponto · Not ready = 0 pontos. Exclua itens N/A. Prontidão % = pontos obtidos / total máximo aplicável.

1. Program structure & governance

Estrutura do programa e governanca

STATUS	READINESS ITEM / ITEM DE PRONTIDAO
☐ R ☐ P ☐ N ☐ N/A	Brazil scope, legal entities, fiscal establishments, sites and warehouses are confirmed. Escopo Brasil, entidades legais, estabelecimentos fiscais, sites e armazens estao confirmados.
☐ R ☐ P ☐ N ☐ N/A	Global-template decisions and Brazil exceptions have named owners and approval routes. Decisoes do template global e excecoes brasileiras possuem responsaveis e rotas de aprovacao.
☐ R ☐ P ☐ N ☐ N/A	Finance, Tax, Accounting, Procurement, Logistics and IT responsibilities are documented. Responsabilidades de Financas, Fiscal, Contabilidade, Compras, Logistica e TI estao documentadas.
☐ R ☐ P ☐ N ☐ N/A	Localization risks, dependencies and target dates are tracked in one governance view. Riscos, dependencias e datas da localizacao sao controlados em uma visao unica de governanca.
☐ R ☐ P ☐ N ☐ N/A	The target operating model includes support, cutover and post-go-live ownership. O modelo operacional inclui suporte, cutover e responsabilidades apos o go-live.

2. Master data & fiscal foundations

Dados mestres e fundamentos fiscais

STATUS	READINESS ITEM / ITEM DE PRONTIDAO
☐ R ☐ P ☐ N ☐ N/A	Addresses, municipalities and IBGE codes are complete and validated. Enderecos, municipios e codigos IBGE estao completos e validados.
☐ R ☐ P ☐ N ☐ N/A	Products have NCM, fiscal classification, origin and relevant tax attributes. Produtos possuem NCM, classificacao fiscal, origem e atributos tributarios aplicaveis.
☐ R ☐ P ☐ N ☐ N/A	Customers and vendors have correct tax registrations and fiscal profiles. Clientes e fornecedores possuem inscricoes e perfis fiscais corretos.
☐ R ☐ P ☐ N ☐ N/A	Operation Types, CFOPs and document types cover every approved scenario. Operation Types, CFOPs e tipos de documento cobrem todos os cenarios aprovados.
☐ R ☐ P ☐ N ☐ N/A	Effective dates and ownership for ongoing fiscal-data maintenance are defined. Vigencias e responsabilidades pela manutencao fiscal continua estao definidas.

3. Tax determination & accounting

Determinacao tributaria e contabilizacao

STATUS	READINESS ITEM / ITEM DE PRONTIDAO
☐ R ☐ P ☐ N ☐ N/A	Sales Tax Groups and Item Sales Tax Groups are complete and consistently assigned. Sales Tax Groups e Item Sales Tax Groups estao completos e atribuidos de forma consistente.
☐ R ☐ P ☐ N ☐ N/A	The Tax Matrix covers ICMS, IPI, PIS/COFINS, ISS, withholding and special treatments. A Tax Matrix cobre ICMS, IPI, PIS/COFINS, ISS, retencoes e tratamentos especiais.
☐ R ☐ P ☐ N ☐ N/A	Recoverable and nonrecoverable taxes reconcile to inventory cost and expenses. Impostos recuperaveis e nao recuperaveis conciliam com custo de estoque e despesas.
☐ R ☐ P ☐ N ☐ N/A	Tax Ledger Posting Groups and posting profiles use approved ledger accounts. Tax Ledger Posting Groups e posting profiles utilizam contas contabeis aprovadas.
☐ R ☐ P ☐ N ☐ N/A	Tax inquiry, document totals and accounting vouchers reconcile end to end. Consulta de impostos, totais do documento e vouchers contabeis conciliam ponta a ponta.

4. Electronic fiscal documents

Documentos fiscais eletronicos

STATUS	READINESS ITEM / ITEM DE PRONTIDAO
☐ R ☐ P ☐ N ☐ N/A	Digital certificate, Azure Key Vault and environment access are operational. Certificado digital, Azure Key Vault e acessos ao ambiente estao operacionais.
☐ R ☐ P ☐ N ☐ N/A	Globalization Studio and Electronic Reporting configurations are synchronized. Globalization Studio e Electronic Reporting estao configurados e sincronizados.
☐ R ☐ P ☐ N ☐ N/A	NF-e and NFS-e scenarios generate, transmit, authorize and return correctly. Cenarios de NF-e e NFS-e geram, transmitem, autorizam e retornam corretamente.
☐ R ☐ P ☐ N ☐ N/A	Authorized XML, DANFE or DANFS-e, access keys and references are retained. XML autorizado, DANFE ou DANFS-e, chaves e referencias sao preservados.
☐ R ☐ P ☐ N ☐ N/A	Rejection, correction, cancellation, contingency and reprocessing are tested. Rejeicao, correcao, cancelamento, contingencia e reproprocessamento estao testados.

5. End-to-end business processes

Processos de negocio ponta a ponta

STATUS	READINESS ITEM / ITEM DE PRONTIDAO
☐ R ☐ P ☐ N ☐ N/A	Domestic sales and purchases are tested from source document through settlement. Vendas e compras nacionais estao testadas do documento de origem ate a liquidacao.
☐ R ☐ P ☐ N ☐ N/A	Imports cover commercial invoice, duties, freight, insurance, landed cost and inventory. Importacoes cobrem commercial invoice, impostos, frete, seguro, landed cost e estoque.
☐ R ☐ P ☐ N ☐ N/A	Exports, transfers, returns and remittances preserve fiscal and inventory traceability. Exportacoes, transferencias, devolucoes e remessas preservam rastreabilidade fiscal e de estoque.
☐ R ☐ P ☐ N ☐ N/A	Services cover municipal documents, ISS, withholding and accounting outcomes. Servicos cobrem documentos municipais, ISS, retencoes e resultados contabeis.
☐ R ☐ P ☐ N ☐ N/A	Representative positive and negative scenarios are supported by business evidence. Cenarios positivos e negativos representativos possuem evidencias do negocio.

6. Tax reform, reporting & compliance

Reforma tributaria, reportes e conformidade

STATUS	READINESS ITEM / ITEM DE PRONTIDAO
☐ R ☐ P ☐ N ☐ N/A	CBS/IBS scope, cClassTrib and transition dates are mapped to the ERP roadmap. Escopo de CBS/IBS, cClassTrib e datas de transicao estao mapeados no roadmap do ERP.
☐ R ☐ P ☐ N ☐ N/A	Regression tests protect current taxes during the transition period. Testes de regressao protegem os tributos atuais durante o periodo de transicao.
☐ R ☐ P ☐ N ☐ N/A	SPED ECD, ECF and other statutory deliverables have a confirmed target architecture. SPED ECD, ECF e demais obrigacoes possuem arquitetura futura confirmada.
☐ R ☐ P ☐ N ☐ N/A	Interfaces with tax engines, fiscal-book providers and external advisors are reconciled. Interfaces com tax engines, provedores fiscais e assessores externos sao conciliadas.
☐ R ☐ P ☐ N ☐ N/A	Compliance evidence, retention and audit responsibilities are documented. Evidencias de conformidade, retencao e responsabilidades de auditoria estao documentadas.

7. UAT, cutover & operational readiness

UAT, cutover e prontidao operacional

STATUS	READINESS ITEM / ITEM DE PRONTIDAO
☐ R ☐ P ☐ N ☐ N/A	UAT scripts define data, expected tax results, fiscal documents, inventory and vouchers. Roteiros de UAT definem dados, impostos esperados, documentos fiscais, estoque e vouchers.
☐ R ☐ P ☐ N ☐ N/A	Business owners execute and sign off representative end-to-end scenarios. Responsaveis do negocio executam e aprovam cenarios representativos ponta a ponta.
☐ R ☐ P ☐ N ☐ N/A	Open defects and workarounds have owners, dates and go-live decisions. Defeitos e workarounds possuem responsaveis, datas e decisoes para o go-live.
☐ R ☐ P ☐ N ☐ N/A	Cutover includes master data, open transactions, certificates, jobs and integrations. Cutover inclui dados mestres, transacoes abertas, certificados, jobs e integracoes.
☐ R ☐ P ☐ N ☐ N/A	Hypercare, monitoring, incident triage and regulatory-change ownership are ready. Hypercare, monitoramento, triagem de incidentes e mudancas legais estao preparados.

Readiness summary

Resumo de prontidao

WORKSTREAM / FRENTE	R	P	N	N/A	SCORE %
1. Program structure & governance Estrutura do programa e governanca					
2. Master data & fiscal foundations Dados mestres e fundamentos fiscais					
3. Tax determination & accounting Determinacao tributaria e contabilizacao					
4. Electronic fiscal documents Documentos fiscais eletronicos					
5. End-to-end business processes Processos de negocio ponta a ponta					
6. Tax reform, reporting & compliance Reforma tributaria, reportes e conformidade					
7. UAT, cutover & operational readiness UAT, cutover e prontidao operacional					
TOTAL READINESS / PRONTIDAO TOTAL					

Interpretation / Interpretacao

80-100%	Strong readiness - focus on residual evidence and cutover discipline. Prontidao forte - concentre-se em evidencias residuais e disciplina de cutover.
60-79%	Conditional readiness - prioritize gaps that block end-to-end testing. Prontidao condicional - priorize lacunas que bloqueiam testes ponta a ponta.
Below 60%	High implementation risk - establish a recovery plan before committing to go-live. Alto risco de implantacao - estabeleca um plano de recuperacao antes do go-live.

Turn the checklist into an actionable roadmap

RV.BR Global ERP helps international teams assess Brazilian localization, prioritize risks and connect Finance, Tax, Supply Chain, technology and governance into one practical delivery plan.

A RV.BR Global ERP ajuda equipes internacionais a avaliar a localizacao brasileira, priorizar riscos e conectar Financas, Fiscal, Supply Chain, tecnologia e governanca em um plano pratico de entrega.

Schedule a conversation / Agende uma conversa
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This checklist is an executive assessment aid, not legal, tax or accounting advice. Project-specific conclusions require validation by the appropriate business, tax, legal and accounting owners.

Este checklist é um instrumento executivo de avaliação, não aconselhamento jurídico, tributário ou contábil. Conclusões específicas exigem validação dos responsáveis de negócio, fiscal, jurídico e contabilidade.