

# Monthly Audit Checklist for Online Stores

*Use this checklist at the end of each month to review, reconcile, and prepare your store for the month ahead.*

## *Finance & revenue review*

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|--------------------------|---|
| <input type="checkbox"/> | Reconcile all sales revenue against orders placed.          |
| <input type="checkbox"/> | Review refunds, returns, and chargebacks for the month.     |
| <input type="checkbox"/> | Check payment gateway settlement reports for discrepancies. |
| <input type="checkbox"/> | Compare actual revenue vs. monthly sales target.            |
| <input type="checkbox"/> | Download and file invoices and transaction records.         |
| <input type="checkbox"/> | Review platform fees, subscriptions, and recurring costs.   |
| <input type="checkbox"/> | Calculate gross margin and note any significant changes.    |

## *Inventory & catalog management*

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|--------------------------|--|
| <input type="checkbox"/> | Audit stock levels and reconcile with your inventory system. |
| <input type="checkbox"/> | Unpublish out-of-stock products with no restock date.        |

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|--------------------------|--|
| <input type="checkbox"/> | Update pricing for products affected by supplier cost changes.   |
| <input type="checkbox"/> | Review and refresh product descriptions or images if outdated.   |
| <input type="checkbox"/> | Identify slow-moving inventory and plan markdowns or promotions. |
| <input type="checkbox"/> | Add newly sourced products to the catalog.                       |
| <input type="checkbox"/> | Check for duplicate or broken product listings.                  |

### *Orders & fulfillment audit*

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|--------------------------|--|
| <input type="checkbox"/> | Review any pending, unresolved, or stuck orders.             |
| <input type="checkbox"/> | Follow up on orders with failed or incomplete payments.      |
| <input type="checkbox"/> | Audit shipping carrier performance and delivery timelines.   |
| <input type="checkbox"/> | Review return and exchange requests and update their status. |
| <input type="checkbox"/> | Identify recurring fulfillment issues and document fixes.    |

### *Customer experience & support*

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|--------------------------|--|
| <input type="checkbox"/> | Review all customer support tickets from the past month. |
|--------------------------|--|

<input type="checkbox"/>	Respond to or close any open support conversations.
<input type="checkbox"/>	Analyze new product reviews and flag issues for follow-up.
<input type="checkbox"/>	Identify top customer complaints and address root causes.
<input type="checkbox"/>	Update FAQs or help content based on common inquiries.
<input type="checkbox"/>	Review return, refund, and shipping policy pages for accuracy.

### *Marketing & promotions review*

<input type="checkbox"/>	Review performance of all campaigns run during the month.
<input type="checkbox"/>	Check email open rates, click-through rates, and conversions.
<input type="checkbox"/>	Review paid ad spend vs. revenue generated (ROAS).
<input type="checkbox"/>	Archive expired discount codes and promotions.
<input type="checkbox"/>	Plan and schedule next month's promotions and campaigns.
<input type="checkbox"/>	Review top-performing and worst-performing content.
<input type="checkbox"/>	Check affiliate or influencer performance if applicable.

## *Analytics & performance*

<input type="checkbox"/>	Review monthly website traffic (sessions, new vs. returning visitors).
<input type="checkbox"/>	Check top landing pages and identify high drop-off points.
<input type="checkbox"/>	Review conversion rate and cart abandonment rate.
<input type="checkbox"/>	Analyze top-selling and least-selling products.
<input type="checkbox"/>	Compare this month's KPIs against last month and last year.
<input type="checkbox"/>	Export and file a monthly analytics report.

## *Technical & store health*

<input type="checkbox"/>	Test checkout flow end-to-end on desktop and mobile.
<input type="checkbox"/>	Check for broken links, 404 pages, or redirect errors.
<input type="checkbox"/>	Verify all payment and shipping integrations are active.
<input type="checkbox"/>	Update homepage banners, offers, and any seasonal content.
<input type="checkbox"/>	Review site speed and flag any performance issues.
<input type="checkbox"/>	Apply pending app, plugin, or integration updates.
<input type="checkbox"/>	Back up store data and confirm it completed successfully.