

January 26, 2026



ERP Data Migration Checklist for Distributors

□ Define Migration Ownership (Before Touching Data)

- Assign a data owner for each area
 - Inventory
 - Customers
 - Vendors
 - Pricing
 - Finance
- Involve warehouse, purchasing, sales, and finance early
- Agree on who signs off data accuracy before go-live

□ Decide What Data Actually Needs to Move

- Identify required operational data only
 - Active customers and vendors
 - Active SKUs and inventory balances
 - Open orders and open POs
 - Current pricing and discounts
- Decide what stays archived
 - Closed orders
 - Old transaction history
 - Inactive items and accounts
- Avoid migrating data “just in case”

□ Clean Data Before Migration

- Remove duplicate customers and vendors
- Inactivate obsolete SKUs
- Standardize naming conventions
- Validate addresses and contact details
- Confirm tax and freight settings

ERP will not fix messy data. Clean it first.

□ Validate Units of Measure and Conversions

- Confirm base unit of measure for each item
- Validate case, pallet, weight, and each conversion
- Check pricing consistency across UOMs
- Test receiving and picking using real UOM scenarios

This is one of the most common causes of post-go-live inventory issues.

□ **Review Inventory Structure and Locations**

- Confirm warehouse definitions
- Validate bin and location structures
- Review lot or serial tracking rules
- Confirm reorder points and safety stock
- Align valuation methods with finance

Inventory structure errors surface immediately after go-live.

□ **Review Pricing and Discount Logic**

- Document customer-specific pricing rules
- Validate contract pricing and discounts
- Identify spreadsheet-based pricing logic
- Test pricing against real customer orders

□ **Plan Multiple Test Migrations**

- Run at least one full test migration
- Validate totals and balances after import

- Run end-to-end transactions
 - Order → Pick → Ship → Invoice
 - PO → Receive → Stock
- Capture issues and correct source data
- Repeat test migrations until results are stable

□ **Test With Real Scenarios, Not Just Reports**

- Warehouse users pick and ship real orders
- Customer service enters and modifies orders
- Purchasing tests replenishment and receiving
- Finance validates balances and reporting

If teams cannot work comfortably, the data is not ready.

□ **Confirm Go-Live Cutover Plan**

- Freeze data changes at the right time
- Confirm final inventory counts
- Validate opening balances
- Align go-live timing with operations
- Define rollback or contingency steps

□ Post Go-Live Validation

- Reconcile inventory after first transactions
- Validate pricing on live orders
- Confirm financial balances
- Monitor adjustments and corrections
- Address issues quickly before workarounds form

The first few weeks matter more than go-live day.

Note: ERP data migration is not a one-time import. It's a controlled transition from old assumptions to new reality. The cleaner and more intentional the data migration, the faster teams trust the system and stop working around it.