



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.