

ADVANTIVE DISTONE MIGRATION GUIDE

Distribution One ERP-ONE / ERP-ONE+ and DDI System Inform ERP

Comprehensive migration strategies for wholesale distributors transitioning to modern cloud ERP

Data Extraction • Table Mapping • VMI Migration • eCommerce Integration

Powered by **Ximple Solutions**

www.ximplesolution.com

1. Understanding Advantive DistOne Systems

Advantive (formed in 2022 through the combination of DDI System and Distribution One) offers two primary ERP solutions for wholesale distributors: Distribution One ERP-ONE/ERP-ONE+ and DDI System Inform ERP. This guide provides comprehensive migration strategies for distributors transitioning from either system to modern cloud ERP.

1.1 Distribution One ERP-ONE/ERP-ONE+ Overview

Distribution One has served wholesalers and distributors for over 20 years with its ERP-ONE+ platform. Key characteristics:

- ☐ Windows-based ERP with SQL Server database
- ☐ Available in Cloud (SaaS) and On-Premises deployment
- ☐ API (Application Program Interface) services available
- ☐ EDI (Electronic Data Interchange) support
- ☐ Mobile CRM and Mobile ERP applications
- ☐ Targets mid to large-size wholesale distributors
- ☐ Industries: Fasteners, industrial, JanSan, HVAC, plumbing, packaging, hardware

1.2 DDI System Inform ERP Overview

DDI System (founded 1993, acquired by Advantive 2022) provides Inform ERP for wholesale distributors. Key characteristics:

- ☐ Windows-based software (fully accessible from any computer)
- ☐ Available On-Premises or hosted on Rackspace
- ☐ Inform eCommerce API available for integrations
- ☐ Over 25 years of distribution expertise
- ☐ Strong in: electrical, irrigation, industrial, janitorial, packaging, rubber, fasteners
- ☐ 10+ upgrades per year providing latest technology

1.3 Document Your Current Configuration

Distribution One ERP-ONE+ Modules

- ☐ Order Entry
- ☐ Accounts Receivable
- ☐ Accounts Payable
- ☐ Inventory Control
- ☐ Warehouse Automation / Wireless Warehousing
- ☐ Vendor-Managed Inventory (VMI)
- ☐ Lot Control / QC Tracking
- ☐ Point of Sale (POS)
- ☐ General Ledger

- ☐ Purchasing
- ☐ Sales Analysis / Dashboard Analytics
- ☐ Customer Relationship Management (CRM)
- ☐ Kitting/Assembly
- ☐ EDI (Electronic Data Interchange)
- ☐ eCommerce Integration
- ☐ Amazon Connectivity
- ☐ Mobile CRM / Mobile ERP
- ☐ RF Scanning

DDI System Inform Modules

- ☐ Order Management / Sales Order Entry
- ☐ Accounts Receivable
- ☐ Accounts Payable
- ☐ Inventory Management / Demand Forecasting
- ☐ Warehouse Management (WMS)
- ☐ Financial Management
- ☐ Purchasing
- ☐ Sales Analysis / Dashboard Analytics
- ☐ CRM / Customer Calling Queue
- ☐ Bid Management / Job Costing
- ☐ EDI (Electronic Data Interchange)
- ☐ Content Management
- ☐ Inform eCommerce Pro
- ☐ Proof of Delivery / Signature Capture
- ☐ Price Matrix

2. Data Extraction Strategies

Both Distribution One and DDI System store data in structured databases. Multiple extraction approaches are available depending on your deployment and access level.

2.1 Distribution One API Extraction

Distribution One provides API (Application Program Interface) services for data access and integration:

- ☐ REST API endpoints available for data retrieval
- ☐ Supports connections to third-party software systems
- ☐ Pre-built integrations: eCommerce, Amazon, shipping, credit card processing
- ☐ EDI support for trading partner data exchange
- ☐ Contact Distribution One support for API documentation
- ☐ Work with Advantive data experts for migration assistance

2.2 DDI System Inform Data Access

DDI System Inform provides data access through multiple channels:

- ☐ Inform eCommerce API - comprehensive transactional interface
- ☐ Supports real-time customer validation/login
- ☐ Price and stock retrieval
- ☐ Sales order submission and retrieval
- ☐ Order list and line-item detail export
- ☐ User-defined fields access

- ☐ API documentation available at ddiusers.com support portal

2.3 Database Export Methods

For comprehensive data extraction, work with your vendor or IT team on these approaches:

- ☐ SQL Server database exports (if on-premises)
- ☐ Standard report exports to CSV/Excel
- ☐ Built-in data export utilities
- ☐ Dashboard data exports
- ☐ EDI file exports for trading partner data
- ☐ Third-party integration tool extracts

2.4 Advantive Data Migration Services

Advantive offers professional data migration services:

- ☐ Data experts transfer data to compatible formats
- ☐ Minimizes expense, burden, and downtime
- ☐ Reduces manual re-keying requirements
- ☐ Ensures greater accuracy
- ☐ Proven methodology developed over 20+ years
- ☐ Contact Advantive for migration assistance scope and pricing

Need help extracting data from DistOne or Inform?

[Request a Migration Assessment](#)

3. Key Data Entities and Mapping

Both Distribution One and DDI System Inform share similar data structures designed for wholesale distribution. Understanding these entities is essential for accurate migration.

3.1 Product/Inventory Data

Data Entity	Key Data Elements
Item Master	Item ID, description, product group, UOM, weight, dimensions
Inventory	Quantities on hand, allocated, on order, by location/warehouse
Product Categories	Product groups, classifications, hierarchies
Unit of Measure	UOM definitions, conversion factors, selling/purchasing units
Vendor Items	Vendor part numbers, costs, lead times, minimum orders
Lot/Serial Tracking	Lot numbers, serial numbers, expiration dates, QC tracking
Kits/Assemblies	Kit definitions, component items, assembly instructions

- ☐ Extract complete item master with all attributes
- ☐ Document product group hierarchy and classifications
- ☐ Map all UOM conversions accurately
- ☐ Export vendor item cross-references with costs
- ☐ Capture lot/serial tracking configurations
- ☐ Document kit/assembly structures

3.2 Customer Data

Data Entity	Key Data Elements
Customer Master	Customer ID, name, terms, credit limit, price class, tax status
Bill-To Addresses	Primary billing addresses, AR correspondence
Ship-To Addresses	Delivery addresses, delivery instructions, tax jurisdictions
Contacts	Contact names, emails, phones, roles, preferences
CRM Data	Customer notes, activity history, calling queue data, opportunities

- ☐ Extract customer master with all ship-to addresses
- ☐ Export contacts linked to customers
- ☐ Document customer price classes and terms
- ☐ Capture credit limits and payment history
- ☐ Export tax exemption certificates
- ☐ Migrate CRM notes and activity history

3.3 Vendor Data

Data Entity	Key Data Elements
Vendor Master	Vendor ID, name, terms, lead times, minimum orders
Vendor Addresses	Remit-to, purchase-from addresses
Vendor Items	Vendor part numbers, costs, quantity breaks
VMI Configurations	Vendor-managed inventory settings, reorder points, agreements

- ☐ Extract vendor master with all addresses
- ☐ Export vendor item cross-references
- ☐ Document payment terms by vendor
- ☐ Capture lead times and minimum order quantities
- ☐ Export VMI customer/vendor configurations
- ☐ Document EDI trading partner settings

3.4 Pricing Data

Both systems support sophisticated pricing structures. Document and migrate all pricing components:

Pricing Component	Description
Price Matrix	Flexible pricing rules by product group, customer class, quantity
Customer Price Classes	Customer classification tiers determining base pricing
Quantity Breaks	Volume-based pricing tiers
Customer-Specific Pricing	Individual customer pricing exceptions and overrides
Contract/Job Pricing	Project-specific pricing agreements with effective dates
Market Cost Pricing	ERP-ONE+ feature: sales from market cost vs. actual purchase cost

- ☐ Document complete price matrix structure and rules
- ☐ Extract all customer price class assignments
- ☐ Export quantity break tiers
- ☐ Capture all customer-specific pricing overrides
- ☐ Export contract/job pricing agreements
- ☐ Document market cost vs. actual cost configurations (ERP-ONE+)

3.5 Transactional Data

Sales Orders and Invoices

- ☐ Extract all open sales orders with line details
- ☐ Include customer PO references
- ☐ Capture backorder quantities
- ☐ Export quotes pending conversion
- ☐ Document special order handling
- ☐ Include job/project linked orders

Purchase Orders

- ☐ Extract open purchase orders
- ☐ Include expected receipt dates
- ☐ Capture partially received quantities
- ☐ Document drop-ship configurations
- ☐ Export blanket/standing order agreements

Accounts Receivable

- ☐ Export open invoice balances
- ☐ Include aging detail by customer
- ☐ Capture unapplied cash receipts
- ☐ Document credit memos and debit memos
- ☐ Export payment history for reference

Accounts Payable

- ☐ Export open voucher balances
- ☐ Include aging detail by vendor
- ☐ Capture pending payments
- ☐ Document prepayments and vendor credits

4. System-Specific Migration Considerations

4.1 Distribution One ERP-ONE+ Specific Features

Document these ERP-ONE+ specific configurations for migration:

Dashboard Analytics

- ☐ Document custom dashboard configurations
- ☐ Export KPI definitions and thresholds
- ☐ Capture user-specific dashboard layouts
- ☐ Document drill-down report configurations

Wireless Warehousing / RF Scanning

- ☐ Document RF device configurations

- ☐ Capture bin location structures
- ☐ Export picking workflow rules
- ☐ Document receiving and put-away processes

Vendor-Managed Inventory (VMI)

- ☐ Document VMI customer agreements
- ☐ Export reorder points and quantities
- ☐ Capture automatic replenishment rules
- ☐ Document consignment inventory configurations

Mobile Applications

- ☐ Document Mobile CRM configurations
- ☐ Capture Mobile ERP workflows
- ☐ Export offline data sync settings

4.2 DDI System Inform Specific Features

Document these Inform-specific configurations for migration:

Demand Forecasting

- ☐ Document forecasting algorithm settings
- ☐ Capture seasonal, sporadic, and recurring product classifications
- ☐ Export exception management rules
- ☐ Document inventory optimization parameters

Bid Management / Job Costing

- ☐ Export active bids and quotes
- ☐ Document job costing configurations
- ☐ Capture retainage settings
- ☐ Export AIA reporting configurations
- ☐ Document digital signature workflows

Inform eCommerce

- ☐ Document eCommerce customer portal configurations
- ☐ Export customer-specific catalog settings
- ☐ Capture saved cart data
- ☐ Document payment profile configurations

Work Queues and Automation

- ☐ Document work queue configurations
- ☐ Export workflow automation rules
- ☐ Capture label printing configurations
- ☐ Document truck dispatch/delivery route settings

Get expert guidance on your DistOne migration

[Schedule a Consultation](#)

5. Integration Points to Document

Both systems support various integrations that must be documented and recreated in the new system.

5.1 eCommerce Integrations

- ☐ Native eCommerce platform configurations
- ☐ Customer portal settings and branding
- ☐ Real-time inventory visibility rules
- ☐ Customer-specific pricing display
- ☐ Order history and tracking integrations

5.2 Marketplace Integrations

- ☐ Amazon connectivity configurations
- ☐ Product listing mappings
- ☐ Order import settings
- ☐ Inventory sync rules

5.3 EDI Connections

- ☐ EDI trading partner list
- ☐ Document types in use (850, 810, 856, etc.)
- ☐ Mapping configurations
- ☐ VAN (Value Added Network) settings

5.4 Shipping Integrations

- ☐ Carrier integrations (UPS, FedEx, etc.)
- ☐ Shipping rate configurations
- ☐ Label printing settings
- ☐ Tracking number automation

5.5 Payment Processing

- ☐ Credit card gateway configurations
- ☐ Payment profiles and tokenization (ERP-ONE+)
- ☐ Cayan gateway settings (DDI Inform)
- ☐ Level 3 processing configurations
- ☐ EMV/chip card settings

5.6 Third-Party Integrations

- ☐ AutoQuotes integration (DDI)
- ☐ Business Intelligence tools
- ☐ CRM integrations
- ☐ Accounting software connections

☐ Custom API integrations

6. Data Quality Assessment

Data quality determines ERP success. Clean data before migration to avoid perpetuating errors.

6.1 Common Data Quality Issues

- ☐ Duplicate customer records
- ☐ Duplicate item/product records
- ☐ Inconsistent naming conventions
- ☐ Obsolete items still marked active
- ☐ Outdated contact information
- ☐ Inactive ship-to addresses still in use
- ☐ Expired pricing agreements still active
- ☐ Inconsistent UOM configurations
- ☐ Missing or incorrect tax exemption data
- ☐ Orphaned records from deleted masters

6.2 Data Cleansing Checklist

Item Master Cleanup

- ☐ Identify and merge duplicate items
- ☐ Standardize product descriptions
- ☐ Validate UOM conversions
- ☐ Mark obsolete items inactive
- ☐ Verify product group assignments
- ☐ Validate vendor item cross-references

Customer Master Cleanup

- ☐ Identify and merge duplicate customers
- ☐ Verify contact information currency
- ☐ Validate ship-to addresses
- ☐ Confirm credit limits and terms
- ☐ Update tax exemption certificates
- ☐ Standardize account naming conventions

Vendor Master Cleanup

- ☐ Verify vendor contact information
- ☐ Validate remit-to addresses
- ☐ Confirm payment terms
- ☐ Update lead times
- ☐ Verify minimum order quantities

6.3 Data Validation Checklist

- ☐ Validate product counts match inventory reports
- ☐ Reconcile customer counts with AR aging
- ☐ Verify pricing for sample customers matches current system
- ☐ Confirm inventory quantities by location
- ☐ Check open order counts and values
- ☐ Validate AR/AP balances to GL

7. Migration Execution Checklist

7.1 Pre-Migration Preparation

- ☐ Complete system configuration documentation
- ☐ Obtain API credentials/access (if applicable)
- ☐ Identify extraction window (off-peak hours)
- ☐ Set up test extraction processes
- ☐ Validate extraction record counts against system reports
- ☐ Engage Advantive support if needed for data access
- ☐ Document current report parameters for validation

7.2 Test Migration Iterations

- ☐ First iteration: Master data only
 - ☐ Products/inventory
 - ☐ Customers and contacts
 - ☐ Vendors
- ☐ Validate record counts and key fields
- ☐ Second iteration: Add pricing data
- ☐ Verify pricing calculations match source system
- ☐ Third iteration: Add open transactions
- ☐ Validate order totals and balances
- ☐ Document and resolve all discrepancies
- ☐ Refine extraction/transformation processes

7.3 Final Data Migration

- ☐ Freeze source system transactions at cutover time
- ☐ Complete final inventory count
- ☐ Extract final master data
- ☐ Extract final open transactions
- ☐ Extract final financial balances
- ☐ Load data to new system
- ☐ Validate record counts
- ☐ Validate financial balances
- ☐ Test critical transactions
- ☐ Obtain sign-off from key users

7.4 Post-Migration Validation

- ☐ Compare product counts: source vs. new system
- ☐ Compare customer counts and AR balances
- ☐ Compare vendor counts and AP balances
- ☐ Validate inventory quantities and values

- ☐ Test pricing for sample customers/products
- ☐ Process test orders end-to-end
- ☐ Verify integration connections
- ☐ Test eCommerce functionality
- ☐ Validate reporting accuracy
- ☐ Confirm EDI transactions process correctly

8. Historical Data Considerations

8.1 What Historical Data to Migrate

Typically Required:

- ☐ Sales history (2-5 years for forecasting)
- ☐ Customer purchase history (for sales analysis)
- ☐ Vendor purchase history (for negotiation)
- ☐ CRM activity history
- ☐ Demand forecasting data

Optional (Consider Cost vs. Benefit):

- ☐ Complete invoice history
- ☐ Payment history
- ☐ Quote history
- ☐ Return/RMA history
- ☐ Bid management history

Typically Not Migrated:

- ☐ Closed orders older than retention period
- ☐ Archived documents (maintain separate access)
- ☐ System logs and audit trails

9. Common Migration Pitfalls to Avoid

9.1 Technical Pitfalls

- ☐ Not engaging Advantive support early for data access
- ☐ Underestimating data extraction complexity
- ☐ Extracting during peak business hours
- ☐ Missing integration configurations
- ☐ Not accounting for multi-location data differences

9.2 Pricing Migration Pitfalls

- ☐ Not understanding price matrix complexity
- ☐ Missing customer-specific pricing exceptions
- ☐ Overlooking quantity break tiers
- ☐ Not migrating contract pricing agreements
- ☐ Losing market cost configurations (ERP-ONE+)

9.3 Functional Pitfalls

- ☐ Not replicating demand forecasting configurations
- ☐ Losing VMI customer agreements

- ☐ Missing bid management/job costing data
- ☐ Overlooking CRM activity history
- ☐ Not testing RF/wireless warehousing workflows

9.4 Process Pitfalls

- ☐ Insufficient user acceptance testing
- ☐ Not validating pricing with actual system quotes
- ☐ Skipping parallel operations period
- ☐ Not training users on workflow differences
- ☐ Rushing cutover without adequate validation
- ☐ Underestimating change management requirements

10. Industry-Specific Considerations

10.1 Fasteners Distribution

- ☐ Bin location structures for small parts
- ☐ VMI customer configurations
- ☐ Kit/assembly structures
- ☐ Thread specification attributes
- ☐ Weight-based pricing rules

10.2 Industrial Supply

- ☐ Safety data sheet (SDS) links
- ☐ Hazmat handling configurations
- ☐ Equipment serial tracking
- ☐ Warranty tracking

10.3 Janitorial/Sanitation (JanSan)

- ☐ Route delivery configurations
- ☐ Customer replenishment schedules
- ☐ Dilution ratio specifications
- ☐ Equipment rental tracking

10.4 HVAC / Plumbing

- ☐ Job/project tracking
- ☐ Contractor pricing tiers
- ☐ Returns and warranty processing
- ☐ Bid management data

10.5 Packaging / Paper

- ☐ Custom size specifications
- ☐ Print specifications
- ☐ Minimum order quantities
- ☐ Roll/sheet conversion calculations

Ready to migrate from Advantive DistOne?

[Request a Migration Assessment](#)

Need Help With Your DistOne Migration?

Ximple Solutions specializes in cloud ERP migrations for wholesale distributors, including transitions from Advantive Distribution One ERP-ONE+ and DDI System Inform ERP.

Our team has deep expertise in both Distribution One and DDI System platforms—ensuring a smooth transition to modern cloud ERP.

Contact Ximple Solutions

Email: info@ximplesolution.com

Phone: +1 301 949 4400

Website: www.ximplesolution.com

[Start Your DistOne Migration Today](#)