

# 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](#)

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# 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](http://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

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