DISTRIBUTION SOFTWARE MIGRATION CHECKLIST

Complete Implementation Readiness Guide

For Wholesale Distribution Organizations

Assessment • Planning • Data Migration • Testing • Go-Live • Optimization

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PHASE 1: Pre-Implementation Assessment

Timeline: 4-8 weeks before project kickoff

Complete these assessments to establish baseline conditions and identify critical requirements before beginning your ERP migration.

1.1 Executive & Organizational Readiness

- ☐ Executive sponsor identified and committed to project involvement
- ☐ Project governance structure established with decision-making authority
- ☐ Cross-functional steering committee formed (Finance, Operations, IT, Sales)
- ☐ Budget approved with contingency (recommend 15-20% buffer)
- ☐ Success metrics and ROI targets defined and documented
- ☐ Communication plan developed for all stakeholders
- ☐ Change management strategy outlined

1.2 Current State Assessment

- ☐ Pain points documented across operations, sales, purchasing, and finance
- ☐ Current system inventory completed (all software, integrations, customizations)
- ☐ Workflow documentation created for critical business processes
- ☐ Spreadsheet dependencies identified (pricing matrices, inventory trackers, reports)
- ☐ Manual workarounds documented with associated labor costs
- ☐ Integration points inventoried (eCommerce, EDI, vendor feeds, banking)
- ☐ Report requirements gathered from all departments

1.3 Data Quality Assessment

- ☐ Item master data audited for duplicates and inconsistencies
- ☐ Customer master data reviewed for completeness and accuracy
- ☐ Vendor master data verified and updated
- ☐ Pricing data audited (contracts, SPAs, matrix pricing, rebates)
- ☐ Historical data retention requirements determined (typically 3-5 years)
- ☐ Data cleanup plan created with responsible parties assigned
- ☐ Data cleanup started (recommend 90 days before go-live)

1.4 Team & Resource Planning

- ☐ Internal project manager assigned (dedicated, not part-time)
- ☐ Department representatives identified for requirements and testing
- ☐ Super-users selected for each department (2-3 per key area)
- ☐ IT resources allocated for technical tasks and integrations
- ☐ Backfill plan developed for team members pulled from daily duties
- ☐ External resources identified if needed (consultants, temporary staff)

PHASE 2: Planning & Configuration

Timeline: Weeks 1-8 of implementation

2.1 Project Planning

- ☐ Detailed project plan created with milestones and deliverables
- ☐ Module prioritization decided (inventory → purchasing → sales → financials)
- ☐ Rollout strategy determined (big-bang vs. phased by location)
- ☐ Pilot branch selected for initial deployment (if phased approach)
- ☐ Go-live date set (avoid peak seasons and fiscal year-end)
- ☐ Contingency plan documented including rollback procedures
- ☐ Risk register created and mitigation strategies defined

2.2 Data Standardization

- ☐ Chart of accounts reviewed and updated for new system
- ☐ Product classification scheme standardized (aligned with industry standards)
- ☐ Units of measure standardized across all products
- ☐ Customer classification/tiers defined and documented
- ☐ Pricing tiers and discount structures standardized
- ☐ Inventory valuation method confirmed (FIFO, Average Cost, etc.)
- ☐ Naming conventions established for items, customers, vendors

2.3 System Configuration

- ☐ Company structure configured (branches, warehouses, cost centers)
- ☐ User roles and security permissions defined
- ☐ Approval workflows configured (pricing, credit, purchasing)
- ☐ Tax rules and compliance settings configured
- ☐ Pricing engine rules configured (matrix, contracts, SPAs, rebates)
- ☐ Inventory parameters set (min/max, reorder points, safety stock)
- ☐ Document templates created (invoices, POs, quotes, packing slips)
- ☐ Alert and notification rules configured

2.4 Integration Development

- ☐ Integration requirements documented for each external system
- ☐ eCommerce platform integration configured and tested
- ☐ EDI connections established with trading partners
- ☐ Vendor price file feeds configured (IDW, Trade Service, etc.)
- ☐ Payment processing integration completed
- ☐ Banking/ACH integration configured
- ☐ Shipping carrier integrations set up (UPS, FedEx, freight)
- ☐ Buying group connections established (AD, IMARK, HARDI, etc.)

Need help with planning and configuration?

Request a Migration Assessment

PHASE 3: Data Migration

Timeline: Weeks 6-12 (overlaps with configuration)

3.1 Master Data Migration

Item Master:

- ☐ Items exported from legacy system
- ☐ Duplicates removed and obsolete items purged
- ☐ Product descriptions standardized
- ☐ Manufacturer cross-references validated
- ☐ Unit of measure conversions verified
- ☐ Test migration completed and validated

Customer Master:

- ☐ Customer records exported and cleaned
- ☐ Duplicate accounts merged
- ☐ Contact information verified and updated
- ☐ Ship-to addresses standardized
- ☐ Credit limits and terms verified
- ☐ Customer-specific pricing migrated

Vendor Master:

- ☐ Vendor records exported and cleaned
- ☐ Payment terms and remittance addresses verified
- ☐ Vendor part number cross-references validated
- ☐ Lead times and minimum order quantities confirmed

3.2 Pricing Data Migration

- ☐ Price lists exported and validated
- ☐ Customer contracts migrated with effective dates
- ☐ Special pricing agreements (SPAs) migrated
- ☐ Matrix pricing rules configured and tested
- ☐ Volume discount structures migrated
- ☐ Rebate programs and accruals migrated
- ☐ Sample pricing scenarios tested and validated

3.3 Transactional Data Migration

- ☐ Open orders migrated with accurate status
- ☐ Open purchase orders migrated
- ☐ Accounts receivable balances migrated and reconciled
- ☐ Accounts payable balances migrated and reconciled
- ☐ Inventory quantities migrated by location/bin

- ☐ Lot/serial number data migrated (if applicable)
- ☐ GL balances migrated and reconciled
- ☐ Historical transaction data loaded (per retention decision)

3.4 Migration Validation

- ☐ Record counts reconciled between legacy and new system
- ☐ Financial balances reconciled (AR, AP, GL, Inventory)
- ☐ Sample records spot-checked for accuracy
- ☐ Pricing validation completed on sample transactions
- ☐ Data migration issues logged and resolved
- ☐ Final cutover migration plan documented

PHASE 4: Testing

Timeline: Weeks 10-14

4.1 Functional Testing by Area

Counter/POS Operations:

- ☐ Product lookup speed validated (sub-second response)
- ☐ Barcode scanning tested with POS hardware
- ☐ Customer identification workflow tested
- ☐ Pricing calculations verified (contracts, volume breaks, SPAs)
- ☐ Payment processing tested (cash, card, account charge)
- ☐ Receipt printing and email delivery confirmed
- ☐ Returns and credit memos processed

Inventory & Warehouse:

- ☐ Receiving workflow tested with barcode scanning
- ☐ Put-away and bin assignment validated
- ☐ Picking and packing workflows tested
- ☐ Cycle counting process validated
- ☐ Inter-branch transfers tested
- ☐ Inventory adjustments and variances processed
- ☐ Mobile device functionality confirmed

Purchasing:

- ☐ Purchase order creation and approval workflow tested
- ☐ Automated replenishment suggestions validated
- ☐ Vendor price file import process tested
- ☐ Three-way match process validated

Sales & Quoting:

- ☐ Quote creation and management tested
- ☐ Quote-to-order conversion validated
- ☐ Credit checking and hold process tested
- ☐ Order entry from all channels tested (counter, phone, portal)

Financials:

- ☐ Invoice generation and delivery tested
- ☐ Payment application and cash receipts tested
- ☐ AP invoice entry and payment processing tested
- ☐ Bank reconciliation process validated
- ☐ Month-end close procedures tested
- ☐ Financial reports validated against expected results

4.2 Integration Testing

- ☐ eCommerce order sync tested (both directions)
- ☐ EDI transactions tested with key trading partners
- ☐ Credit card processing integration validated
- ☐ Shipping carrier integration tested
- ☐ Vendor price file import tested with live data
- ☐ Banking/ACH integration tested
- ☐ Error handling validated for each integration

4.3 User Acceptance Testing (UAT)

- ☐ UAT test scripts prepared for each department
- ☐ Counter staff completed UAT with realistic scenarios
- ☐ Warehouse team completed UAT with real transactions
- ☐ Purchasing team completed UAT
- ☐ Finance team completed UAT including month-end
- ☐ Sales team tested quoting and order entry
- ☐ UAT issues documented and resolved
- ☐ Sign-off obtained from each department

Get expert guidance on testing and validation

[Schedule a Consultation]

PHASE 5: Training

Timeline: Weeks 12-16 (overlaps with testing)

5.1 Training Preparation

- ☐ Training environment configured with realistic data
- ☐ Role-based training curriculum developed
- ☐ Training materials created (manuals, quick reference guides)
- ☐ Training schedule published with all sessions
- ☐ Video tutorials recorded for common workflows
- ☐ Training room/equipment reserved

5.2 Role-Based Training Completion

- ☐ Super-users trained first (train-the-trainer model)
- ☐ Counter staff training completed (product lookup, transactions, payments)
- ☐ Warehouse staff training completed (receiving, picking, scanning)
- ☐ Purchasing staff training completed (POs, vendor management)
- ☐ Inside sales training completed (orders, quotes, customer service)
- ☐ Finance team training completed (AR, AP, GL, reporting)
- ☐ Management training completed (dashboards, reporting, approvals)
- ☐ IT/Admin training completed (user management, configuration)

5.3 Training Validation

- ☐ Training attendance tracked and gaps addressed
- ☐ Competency assessments completed for critical roles
- ☐ Refresher training scheduled for those needing additional help
- ☐ Support contact information distributed to all users
- ☐ Training documentation accessible to all users

PHASE 6: Go-Live Preparation

Timeline: 1-2 weeks before go-live

6.1 Final Readiness Checklist

- ☐ All critical UAT issues resolved
- ☐ All integrations tested and operational
- ☐ All users trained and competent in their roles
- ☐ Data migration validated and final cutover plan ready
- ☐ Hardware deployed (POS terminals, scanners, printers)
- ☐ Network and infrastructure validated
- ☐ Go/No-Go decision meeting scheduled

6.2 Cutover Planning

- ☐ Cutover timeline documented hour-by-hour
- ☐ Cutover team roles and responsibilities assigned
- ☐ Legacy system freeze point determined
- ☐ Final data migration scheduled
- ☐ Physical inventory count scheduled (if required)
- ☐ Rollback criteria defined
- ☐ Rollback procedures documented and tested

6.3 Support Planning

- ☐ Go-live support schedule published (extended hours)
- ☐ On-site support resources assigned to each location
- ☐ Vendor support escalation path confirmed
- ☐ Issue tracking system ready
- ☐ War room established with communication tools
- ☐ Temporary staffing increase planned for go-live period

6.4 Communication

- ☐ Customer communication sent about any service changes
- ☐ Vendor communication sent about new system/processes
- ☐ Employee communication sent with go-live details
- ☐ Emergency contact list distributed to all team members

PHASE 7: Go-Live Execution

Timeline: Go-live day and first week

7.1 Go-Live Day Checklist

- ☐ Final data migration completed
- ☐ Data migration validation completed (balances, counts)
- ☐ Legacy system access restricted
- ☐ Production system activated
- ☐ All users able to log in
- ☐ Integrations activated and flowing
- ☐ First transactions processed successfully
- ☐ Support team in place and responding to issues
- ☐ Issue log active and being updated

7.2 First Week Validation

- ☐ Daily transaction volumes monitored
- ☐ System performance monitored (response times, capacity)
- ☐ Integration health verified daily
- ☐ Critical issues addressed within SLA
- ☐ User feedback collected and addressed
- ☐ Daily status meetings held with project team
- ☐ Invoicing and payment processing validated
- ☐ Inventory accuracy spot-checked

PHASE 8: Post Go-Live Optimization

Timeline: Weeks 2-12 after go-live

8.1 Stabilization (Weeks 2-4)

- ☐ All critical issues resolved
- ☐ First month-end close completed successfully
- ☐ Financial reconciliations balanced
- ☐ User adoption metrics reviewed
- ☐ Additional training provided where needed
- ☐ Workarounds documented for any remaining issues
- ☐ Performance baseline established

8.2 Optimization (Weeks 4-12)

- ☐ System usage analytics reviewed
- ☐ Workflow optimizations identified and implemented
- ☐ Advanced features enabled (deferred from initial go-live)
- ☐ Custom reports developed for business needs
- ☐ Pricing rules refined based on actual results
- ☐ Inventory parameters tuned (min/max, reorder points)
- ☐ Dashboard and KPI refinements completed

8.3 Project Closure

- ☐ Legacy system decommissioned
- ☐ Legacy data archived per retention policy
- ☐ Lessons learned documented
- ☐ ROI assessment completed against original targets
- ☐ Ongoing support model transitioned from project to BAU
- ☐ Project formally closed with executive sign-off

Implementation Timeline Summary

Typical 16-20 week implementation timeline for mid-market wholesale distributors:

Phase	Timeline	Key Deliverables
1. Assessment	Pre-project	Executive buy-in, team formed, data assessed
2. Planning	Weeks 1-8	Project plan, configuration, integrations started
3. Data Migration	Weeks 6-12	Data cleansed, test migrations completed
4. Testing	Weeks 10-14	UAT completed, issues resolved, sign-off
5. Training	Weeks 12-16	All users trained and competent
6. Go-Live Prep	Weeks 15-16	Cutover plan ready, Go/No-Go decision
7. Go-Live	Week 17	System live, transactions processing
8. Optimization	Weeks 18-28	Stabilization, refinements, legacy retired

Critical Success Factors

1. Executive sponsorship: Visible leadership commitment throughout the project
2. Dedicated resources: Project team with protected time, not just added responsibilities
3. Data quality: Clean data before migration—garbage in, garbage out
4. Change management: Comprehensive communication and training program
5. Realistic timelines: Allow proper testing and training—rushing leads to failure
6. Best practices adoption: Embrace new workflows rather than replicating legacy processes

Ready to start your distribution software migration?

Request a Readiness Assessment

Ready to Start Your Migration?

Ximple Solutions specializes in cloud ERP implementations for wholesale distributors. Our proven methodology and distribution expertise help ensure your migration success.

Request a migration readiness assessment to understand your path to cloud ERP success.

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