

Distribution Data Migration Readiness Checklist

A six-stage working checklist for preparing operational data before import, plus an exception log for anything that cannot be resolved before cutover.

1. Ownership	Done	Owner / evidence
Name a business owner for each dataset	☐	
Agree who can approve deletions, merges and rule changes	☐	
Freeze ad-hoc structural changes during the final preparation window	☐	
2. Identity	Done	Owner / evidence
Define the unique identifier for each customer, product, supplier and delivery point	☐	
Find duplicates and decide which record survives	☐	
Standardise names, codes, addresses and required reference fields	☐	
3. Relationships	Done	Owner / evidence
Check customer-to-delivery-point links	☐	
Check product-to-price / customer-group relationships	☐	
Check supplier, route and account relationships that must survive migration	☐	
4. Commercial rules	Done	Owner / evidence
List price lists, discounts, markups and customer-specific exceptions	☐	
Identify credit, minimum-order and status rules that affect order handling	☐	
Document standing / recurring-order rules that must be recreated	☐	
5. Sample import	Done	Owner / evidence
Prepare a representative sample rather than only clean records	☐	
Import the sample and inspect the result in the target system	☐	
Record exceptions and repeat until the sample behaves as expected	☐	
6. Cutover	Done	Owner / evidence
Agree the final extraction time and ownership of late changes	☐	
Reconcile record counts and critical balances before go-live	☐	
Keep an exception list with named owners for anything intentionally carried forward	☐	

Distribution Data Migration - Exception Log

Not every issue needs to block cutover. What matters is that unresolved items are explicit, owned and dated.

Exception log

Data / rule	Issue	Decision	Owner	Due

Cutover sign-off

Business data owner	_____	Date	_____
Implementation owner	_____	Date	_____
Known exceptions accepted?	☐ Yes ☐ No	Next review	_____

This checklist is a planning aid, not a substitute for the implementation process agreed for your system and integrations.