Order management system migration

Overdenture and dental implant manufacturer

- Ensured one-time data migration and ongoing data synchronization, for order and customer data, across the order management modules of Magento and M2M (legacy ERP system)

- Automated data accuracy validation across both systems on daily basis

M2M to Magento data migration and validation for PE-owned medical manufacturing firm

Situation

- Client was adopting a new order management tool (Magento), by transitioning from a legacy ERP system (M2M). During the transition, there were issues due to incorrect data migration, leading to misdirected orders thereby losing revenue in returns and exchanges, and impacting customer satisfaction
- Partnered with the client to ensure one-time data migration and ongoing data synchronization, for order and customer data, across the two systems. In addition, we automated the data accuracy validation across both systems on daily basis.
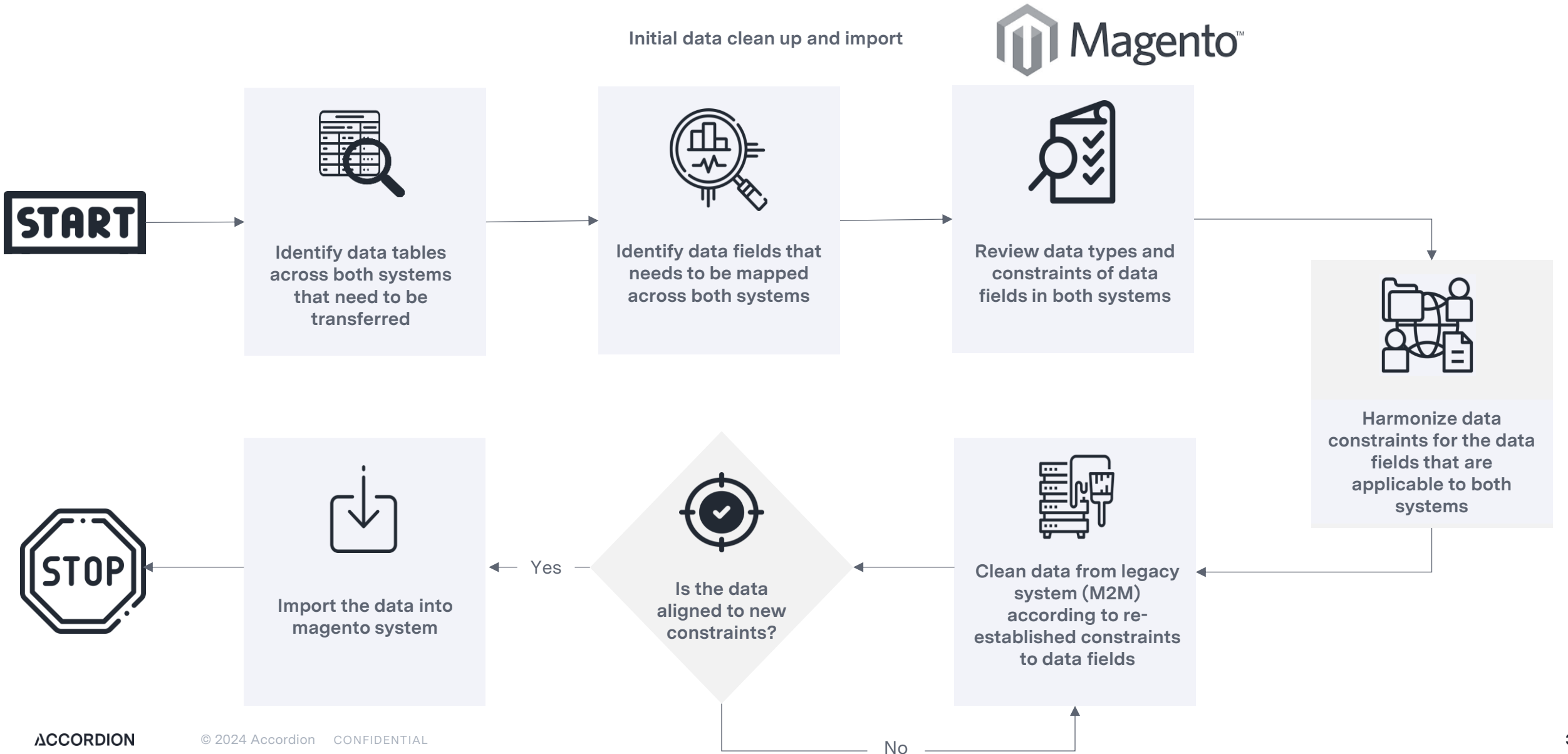
Accordion Value Add

- Conducted an elaborate due-diligence of existing data infrastructure and closely monitored the data migrated in batches to ensure real-time validation
- Identified data mapping and logic issues between the two systems (Magento & M2M), and flagged them for SI partner to address, to ensure accuracy of the migrated data
- Identified the key fields leading to data transfer failures, and cleansed the data accordingly so that there would be minimum rejections from Magento and M2M systems
- Set up automated data validation scripts and processes, to validate the sanctity of the data within individual systems and across both systems
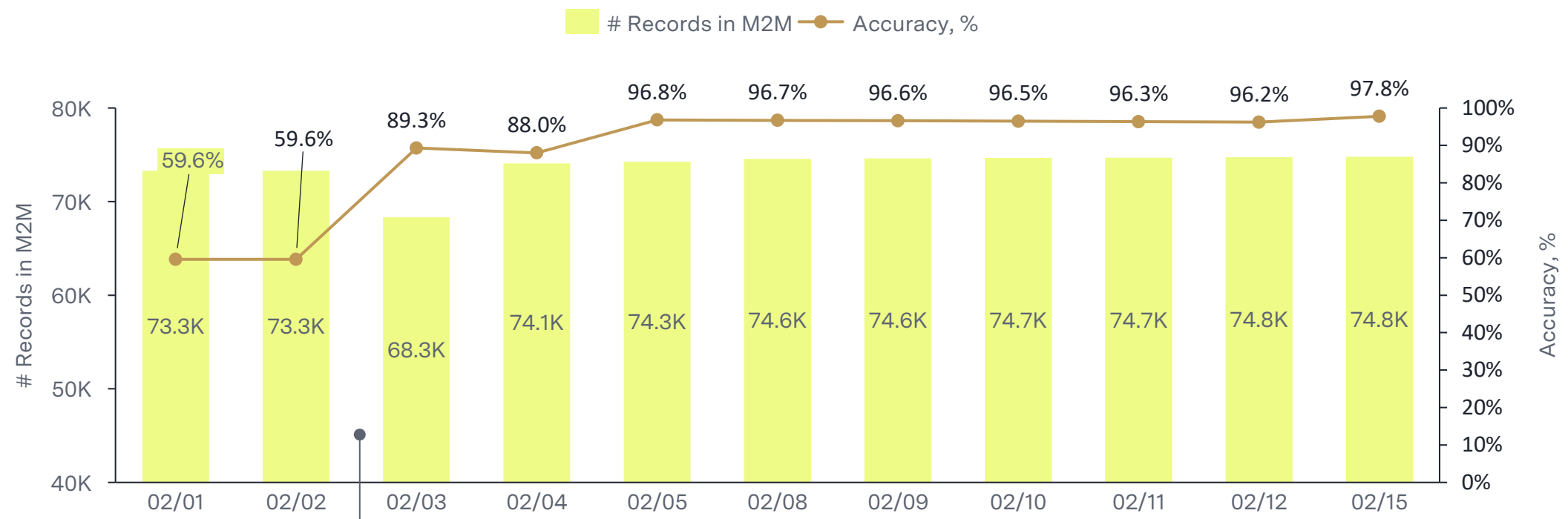
Impact

- Achieved 99% accuracy of the data between the systems, after two iterations of data migration
- Product returns and exchanges reduced significantly (decrease in returns by ~15%)
- Sales team spent less time in processing orders and were able to handle more leads per day, leading to increase in revenue

Approach & methodology

Initial data clean up and import

START → Identify data tables across both systems that need to be transferred → Identify data fields that needs to be mapped across both systems → Review data types and constraints of data fields in both systems → Harmonize data constraints for the data fields that are applicable to both systems

Import the data into magento system ← Yes ← Is the data aligned to new constraints? ← Clean data from legacy system (M2M) according to re-established constraints to data fields

No

STOP

Accuracy of data migration

Accuracy Assessment – Migrated Customer Address data from Magento to M2M legacy system

aptean
Made2Manage ERP

Post-data cleansing and reconciliation, accuracy increased significantly

Accuracy assessment across systems

Magento   Aptean
Made2Manage ERP

Fields (Magento Database)	Fields (M2M Database)	Business Rules		Production	
		Magento	M2M	M2M	Magento
Customer accounts that are currenlty in M2M				32,092	31,742
Customer with accurate info				31,298	31,498
Accuracy				**97.53%**	**99.23%**
Records with accurate information					
email	email2	The field shouldn't be empty and should be unique	The field shouldn't be empty and should be unique	31,601	31,742
email2	fcemail	The field shouldn't be empty	The field shouldn't be empty	32,092	31,742
channel	channel	Values should be one from the dropdowns. The field shouldn't be empty	Values should be one from the dropdowns. The field shouldn't be empty	32,092	31,742
firstname	fcfname	The field shouldn't be empty (Length < 256)	The field shouldn't be empty	32,092	31,742
lastname	fcontact	The field shouldn't be empty (Length < 256)	The field shouldn't be empty	32,092	31,742
sub_type	Subtype	Values should be one from the dropdowns. The field shouldn't be empty	Values should be one from the dropdowns. The field shouldn't be empty	32,092	31,742
m2mid	fcustno	Should be unique and shouldn't be empty	Should be unique and shouldn't be empty		31,742
segments	segments	Values should be one from the dropdowns. The field shouldn't be empty	Values should be one from the dropdowns. The field shouldn't be empty	32,092	31,742
practicetype	PRACTICETYPE	Values should be one from the dropdowns. The field shouldn't be empty	Values should be one from the dropdowns. The field shouldn't be empty	32,092	31,742
Defaultbilling.Company	fcompany	The field shouldn't be empty	The field shouldn't be empty	32,092	31,521
Defaultbilling.Phone	fphone	The field shouldn't be empty and length = 10	The field shouldn't be empty and length = 10	32,011	31,498
Defaultbilling.Street	fmstreet	The field shouldn't be empty	The field shouldn't be empty	32,092	31,522
Defaultbilling.city	fcity	The field shouldn't be empty	The field shouldn't be empty	32,091	31,522
Defaultbilling.region	fstate	The field shouldn't be empty	The field shouldn't be empty	32,088	31,517
Defaultbilling.postcode	fzip	The field shouldn't be empty	The field shouldn't be empty	32,092	31,522
Defaultbilling.country_id	fcountry	The field shouldn't be empty. country_id = 'US'	The field shouldn't be empty. Fcountry = 'USD'	32,092	31,522

Estimated accuracy of compliance to business rules in respective systems prior to migration

Flagged key fields causing data mismatches and migration failures