

Data Migration Plan for XMPS Odoo ERP Implementation

1. Purpose

The purpose of this document is to outline the data migration plan for the XMPS ERP implementation using Odoo 18 Online SaaS Enterprise Edition. The plan ensures that critical business data is accurately and efficiently transferred from external Excel sheets into the Odoo system.

2. Scope

The migration scope includes the following datasets:

- Product ,Product Category, Putaway Rule, Packaging, Operations and Locations Data.
- Vendor (Supplier) List and Purchase Template.
- Customer List
- Chart of Accounts and Analytic Accounts.

3. Data Sources

All data is stored in structured and clean Microsoft Excel sheets. Each dataset is stored in a separate worksheet as outlined below:

Dataset	File Name	Source Format
Products	products.xlsx	Excel (.xlsx)
Product Packaging	Product Packaging	Excel (.xlsx)
Operations	Operations.xlsx	Excel (.xlsx)
Locations	Locations.xlsx	Excel (.xlsx)
Putaway Rule	Putaway Rule.xlsx	Excel (.xlsx)
Vendors	vendors.xlsx	Excel (.xlsx)
Customers	customers.xlsx	Excel (.xlsx)
Chart of Accounts	chart_accounts.xlsx	Excel (.xlsx)
Analytic Accounts	Analytic Accounts.xlsx	Excel (.xlsx)
Purchase Template	Purchase Template.xlsx	Excel (.xlsx)

4. Fields Included

4.1 Product Sheet

- Product Name
- Product Category
- Cost
- Sales Price
- Product Type (Storable / Consumable / Service)
- Unit of Measure (if applicable)

4.2 Product Packaging Sheet

- Contained Quantity
- Product
- Product Packaging
- Sales
- Purchase
- Unit of Measure

4.3 Operations Sheet

- Destination Location
- Create Backorder
- Analytic Costs
- Sequence Prefix

4.4 Locations Sheet

- Full Location Name
- Location Type
- Parent Location
- Location Name

4.5 Putaway Rule Sheet

- When product arrives in
- Product Category
- Store to sublocation
- Company

4.6 Vendor Sheet

- Vendor Name
- Country

4.7 Customer Sheet

- Customer Name
- Country

4.8 Chart of Accounts Sheet

- Account Code
- Account Name
- Account Type

4.9 Analytic Accounts Sheet

- Analytic Account
- Customer
- Plan

4.10 Purchase Templates Sheet

- Agreement
- Agreement Type
- Purchase Representative
- Operation Type
- Products to Purchase/Product
- Products to Purchase/Product Unit of Measure
- Products to Purchase/Quantity
- Products to Purchase/Unit Price

5. Data Cleansing

All Excel sheets have been reviewed and confirmed to be clean:

- No empty mandatory fields
- No duplicate records
- Correct formatting (e.g., numerical fields, valid email addresses)
- Standardized data categories

6. Data Mapping

All fields in the Excel sheets are mapped to Odoo's standard fields using Odoo's built-in import tool. No custom mapping or transformation scripts are required. The column headers in the Excel files match Odoo's expected field names.

7. Migration Tool

The built-in Odoo Import Tool will be used for this migration process. This tool supports:

- Drag-and-drop upload of Excel sheets
- Field mapping interface for validation
- Real-time error detection and feedback

8. Test Migration

A test import was successfully conducted using sample data from each sheet:

- The system accepted the data without errors.
- Records appeared as expected in their respective modules.
- Validation checks passed.

9. Final Migration

The final migration will be conducted in a clean environment:

- All records will be imported using the validated and approved Excel sheets.
- The same steps and format from the test import will be followed.

10. Post-Migration Validation

After the final migration, data will be validated by comparing the contents in Odoo with the original Excel files. The checks will include:

- Record counts
- Field accuracy (e.g., prices, codes, names)
- Module functionality (e.g., product search, vendor lookups)

11. Conclusion

This data migration plan ensures that essential business data is transferred efficiently and reliably into Odoo. The clean structure, validated mappings, and post-import verification contribute to a successful migration process.