

Checklist 1: Item Data

Ensuring accurate and complete product master data for supply planning, forecasting, and replenishment.

Data to Gather

- ☐ Item number (unique and consistent)
- ☐ Item name and description
- ☐ Unit of measure (base and purchase)
- ☐ Item group/classification (e.g., category levels)
- ☐ Original item number from supplier/vendor
- ☐ Pricing (sale, cost, and purchase)
- ☐ Minimum and maximum stock levels
- ☐ Lead time (often inherited from vendor data)
- ☐ Order multiples and pallet quantities
- ☐ Special flags (e.g., Closed for Ordering or Special Order)

Validation Tips

- ☐ Ensure consistent formatting of item numbers (e.g., avoid spaces and special characters).
- ☐ Validate unit conversions between purchase and base units.
- ☐ Check for duplicates and incomplete descriptions.

Data Cleaning Steps

- ☐ Close all inactive item numbers.
- ☐ Eliminate deprecated SKUs (closed or discontinued).
- ☐ Align all items with valid item groups and units of measure.

Integration Considerations

- ☐ Confirm item data maps correctly across locations and vendors.
- ☐ Tag items that are location-specific or vendor-dependent.

Checklist 2: **Supplier (Vendor) Data**

Clean, structured vendor data ensures accurate procurement and sourcing strategies.

Data to Gather

- ☐ Vendor number and name
- ☐ Primary vendor relationships per item
- ☐ Lead time per vendor
- ☐ Vendor status (active/inactive)
- ☐ Ordering constraints (min order qty, order multiple, cost info)

Validation Tips

- ☐ Ensure no duplicate vendor entries (e.g., different formats for the same supplier).
- ☐ Confirm that vendor-item links reflect current business practices.
- ☐ Check that all items have at least one valid vendor.

Data Cleaning Steps

- ☐ Consolidate vendor records for the same entity.
- ☐ Standardize vendor names and remove outdated entries.
- ☐ Validate vendor lead times and other terms.

Integration Considerations

- ☐ Confirm vendor info is reflected in purchase order routes.
- ☐ Ensure vendors are properly connected to items and locations in the ERP system.

Checklist 3: Sales Data

Reliable sales data supports demand forecasting, inventory planning, and financial reporting.

Data to Gather

- ☐ Historical sales quantities by item and location
- ☐ Sales dates and timeframes
- ☐ Sale prices and revenue data
- ☐ Item identifiers used in transactions
- ☐ Customer identifiers

Validation Tips

- ☐ Ensure all sales records are linked to valid item numbers.
- ☐ Cross-check sales price vs. master item sale price.
- ☐ Check for anomalies or missing periods in historical data.

Data Cleaning Steps

- ☐ Convert sales timestamps to a standard format (e.g., ISO 8601).
- ☐ Remove corrupted or test records.
- ☐ Align historical sales with standardized item IDs.

Integration Considerations

- ☐ Ensure sales history is available in formats digestible by ERP and planning tools.
- ☐ Use this data to support forecasting models and replenishment logic.

Checklist 4: Order Data (Purchase & Transfer)

Clean order data helps automate replenishment and optimize logistics.

Data to Gather

- ☐ Undelivered orders
- ☐ Purchase and transfer order routes (item, location, vendor/source location)
- ☐ Lead time, frequency, min order qty, and order multiple
- ☐ Prices (cost and purchase)
- ☐ Primary route indicators

Validation Tips

- ☐ Validate each order route links a valid item, vendor/location, and destination.
- ☐ Ensure lead times are realistic and reflect actual delivery performance.
- ☐ Check for redundant or conflicting order routes.

Data Cleaning Steps

- ☐ Consolidate duplicate or conflicting routes.
- ☐ Eliminate obsolete routes (e.g., closed vendors/locations).
- ☐ Verify cost and purchase prices match vendor master data.

Integration Considerations

- ☐ Map order routes to ERP logistics modules.
- ☐ Distinguish between purchase vs. internal transfer routes.