

Prophet 21 SaaS Pre-Migration Checklist

Quick technical inventory before moving to P21 SaaS

Use this checklist to identify customizations, integrations, and automation that may require redesign during a SaaS transition.

Custom Database Objects

- ☐ Custom SQL views
 - ☐ Stored procedures
 - ☐ SQL triggers
 - ☐ Scheduled SQL jobs
 - ☐ Custom or staging tables
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Automation & Scheduled Tasks

- ☐ Windows Task Scheduler jobs
 - ☐ Server-based print jobs
 - ☐ File-based automation (FTP, folders, scripts)
 - ☐ Alert systems tied to SQL triggers
 - ☐ Scheduled executables or automation utilities
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Business Rules

- ☐ Visual or custom business rules
 - ☐ Rules that rely on direct SQL logic
 - ☐ Rules using custom messages or scripting
 - ☐ Rules triggered from external processes
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Reporting

- ☐ SSRS reports
 - ☐ Crystal forms
 - ☐ InfoMaker or legacy portals
 - ☐ Reports requiring real-time data
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Integrations & Add-Ons

- ☐ WMS, eCommerce, EDI, CRM, or shipping systems
 - ☐ Any integration writing directly to SQL
 - ☐ Third parties requiring database access
 - ☐ Integrations that require IP whitelisting
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Custom Applications

- ☐ .NET console applications
 - ☐ Windows services
 - ☐ Scheduled executables
 - ☐ Custom rule engines or processors
 - ☐ ETL or middleware tools
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Printing & Document Automation

- ☐ Scheduled printing processes
 - ☐ Server-based print routing
 - ☐ Automated document generation tied to SQL
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Quick Self-Assessment

- If you checked **0–3 items**: Migration is likely straightforward.
- If you checked **4–10 items**: Some redesign or hosting changes may be required.
- If you checked **10+ items**: Expect a structured customization and integration migration plan.



Need help with the technical side of your SaaS move?

MindHARBOR specializes in:

- Customization and integration audits
- Automation redesign
- Reporting environment rebuilds
- Third-party integration migrations
- Custom application transitions
- Data migrations and transformations

Learn more online: www.MindHARBOR.com

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