

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

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

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



Reporting

- SSRS reports
- Crystal forms
- InfoMaker or legacy portals
- Reports requiring real-time data

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

Custom Applications

- .NET console applications
- Windows services
- Scheduled executables
- Custom rule engines or processors
- ETL or middleware tools

Printing & Document Automation

- Scheduled printing processes
- Server-based print routing
- Automated document generation tied to SQL

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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