

Before You Sign: 10 Questions to Ask Your AI ERP Provider About Data Migration

A due-diligence data migration checklist for finance teams evaluating an AI-native ERP

AI-powered migration claims are compelling, and some are genuinely accurate. But "migration" means different things to different vendors, and the gap between what's claimed and what actually lands in your system is where most surprises happen. It's also easy to overlook that the numbers tying out is only half the job: your auditors will need the migration process itself documented, not just the reconciled totals. Here's what to ask, and what to listen for, before you commit.

THREE THINGS GET MIGRATED

Master records: your customers, vendors, items, and chart of accounts. The reference data everything else attaches to.

Historical financials: closed-period transaction history. What your reporting and audit trail rely on.

Open transactions: unpaid invoices, unpaid bills, anything still active. What your team needs to keep operating on day one.

A vendor claiming a "fast" or "AI-powered" migration may mean all three, or just one. The questions below help you find out which.

HOW TO USE THIS

Bring it to your next AI ERP demo and take notes in real time. The specific wording of the answer matters more than a simple yes or no.

1. How many times have you performed this migration process?

Context: Confidence in a demo isn't the same as a track record. Get a hard number.

SAFE ANSWER

A specific figure, broken out by your legacy system (e.g., "30+ from QuickBooks Online"), plus common issues they've hit along the way. Specificity signals real experience.

RED FLAG

"We've done a lot of these" with no number, or a pivot to how the AI works instead of how often it's been used.

2. Do you have a documented migration process I can review?

Context: A repeatable, written process means the vendor has learned from past migrations, not that you're the one absorbing the learning curve. Make sure it covers actual transactions, not just master records.

SAFE ANSWER

They can show an actual playbook, including risks and issues they typically find in data like yours.

RED FLAG

"Every migration is different, so we don't really have a fixed process," or a document that only covers master data setup.

3. What feedback have you gotten from clients post-go-live?

Context: Case studies are always polished. You want the honest version, and ideally a reference.

SAFE ANSWER

They volunteer both wins and rough edges, and offer a reference, ideally in your industry or from your same legacy system.

RED FLAG

Only generic testimonials, no reference offered, or reluctance to discuss what's gone wrong.

4. Who owns de-duplicating our customer, vendor, and item lists?

Context: Years of data usually means duplicates: the same vendor entered three ways, items created ad hoc over time. Left alone, that fragments reporting. Worse, the system could merge records that shouldn't be merged.

SAFE ANSWER

The AI surfaces candidates, but a person who knows the difference between "Acme Corp" and "Acme Corp West" makes the final call. Real de-duplication takes human judgment regardless of the tooling.

RED FLAG

"The AI handles it," with no human review step or exception report mentioned.

5. How do you handle a change in our chart of accounts or segment structure?

Context: Companies rarely keep the same structure. QuickBooks typically has just a GL account and one class segment; most ERPs support several (department, location, project, entity). We regularly see clients split one QuickBooks class field into multiple segments in the new system.

SAFE ANSWER

A clear owner for the mapping decision (vendor AI, implementation team, or your finance team), and a real process for expanding or re-segmenting, not just assuming your structure carries over.

RED FLAG

An assumption that your structure carries over cleanly, or no clear answer on who does the remapping.

6. Does their data migration process bring over individual transactions or summary journal entries, and what are the limits of each?

Context: Summary journals can make a migration look fast and clean, but you lose transaction-level detail. Individual entries have limits too: in NetSuite, journal entries can't carry items or track payment application. There's a reporting cost either way, since less granular data means less for the AI to analyze later.

SAFE ANSWER

A clear breakdown of which transaction types load which way, and what's given up with each.

RED FLAG

"It's all handled," with no specifics by transaction type.

7. Are open items and historical detail included, or just opening balances?

Context: Aging AR/AP and transaction history are harder to migrate than a clean opening balance. Connects to Q6: if open items load as journal entries, will they clear automatically, or will your team be manually paying off journals for months?

SAFE ANSWER

Aging detail carries over at the line-item level, with a clear plan for clearing any open-item journals quickly.

RED FLAG

A description that stops at the balance sheet snapshot, with no answer on aging detail.

8. Is deferred revenue / rev rec history fully captured, or rebuilt from scratch?

Context: Rev rec waterfalls (multi-period schedules, contract-level detail, ASC 606) are their own animal. Especially worth pressing if you're SaaS or subscription-based.

SAFE ANSWER

A specific explanation of how historical schedules migrate, including contract-level detail.

RED FLAG

"We can import that," with no detail on how the waterfall gets rebuilt.

9. What happens to transactions that don't fit the standard pattern?

Context: Multi-currency, intercompany, partial payments, credits across periods: every company has some. Especially high-complexity if you have multiple subsidiaries or eliminations tracked outside your accounting system.

SAFE ANSWER

A named exception-handling workflow with a clear owner, and, if you're multi-entity, a demo that reflects that complexity.

RED FLAG

A demo showing only a single simple entity, or no clear answer on who resolves exceptions.

10. Who validates the migrated data, you (the client) or the vendor handling the data migration?

Context: Someone needs to catch a mismapped account or misread transaction, on a defined timeline. Just as important: is a fix easy, or is the transaction locked once loaded? And six months from now, if your auditor has a question, is there a specific person to call?

SAFE ANSWER

A defined review/sign-off process with clear ownership, an easy path to correct mismapped transactions, and a named post-migration contact.

RED FLAG

No defined process, no clear fix path for errors, or an implied "the team disbands once the project closes."

Also worth asking, if reporting matters to your board or investors: can the vendor rebuild your actual current reports (aging, board deck, covenant reporting) in their system before you sign, not after?

READING YOUR RESULTS

Mostly safe answers across the board is a good sign. Three or more red flags, especially on Questions 6, 9, or 10, is worth slowing down for before you sign anything.