

Odoo Migration Checklist

The Complete Pre-Flight Framework for a Clean, Predictable ERP Upgrade

READING TIME

12 Minutes

BEST USED

4-6 Weeks Pre-Migration

CHECKLIST ITEMS

90+ Actions

FORMAT

Print & Score

Why This Checklist Matters

Most Odoo migrations don't fail because of the upgrade tool. They fail because nobody checked what needed checking before the project started — a custom module nobody remembered, an integration that quietly changed its API, a backup that never included the filestore. This checklist exists to catch those gaps while they still cost nothing to fix, instead of mid-migration, under time pressure.

Who Should Use This

- IT teams and Odoo administrators planning an upgrade
- Operations and finance leads who depend on ERP accuracy
- Consultants running migrations for clients
- Anyone moving Community to Enterprise, or jumping versions

What You'll Walk Away With

- A completed pre-migration readiness audit
- A tested, sequenced go-live plan with rollback triggers
- A post-migration verification routine
- A readiness score you can share with stakeholders

QUICK TIP

Flip to the Readiness Scorecard on Page 5 first and score yourself honestly before working through the checklists. It tells you exactly where to spend your remaining prep time — instead of treating every section as equally urgent.

This document covers six phases in order: pre-migration readiness, migration-day execution, post-migration verification, the ten mistakes that derail most projects, a printable readiness scorecard, and how to get expert help if your environment is more complex than a checklist alone can de-risk.

Pre-Migration Checklist

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Treat every item below as a gate, not a suggestion. Don't move forward until it's genuinely done — not just acknowledged.

Business Preparation

- ☐ **Confirm the migration timeline with every affected department.** CRITICAL
Teams need the date before technical prep starts, not after.
- ☐ **Define what "success" means in writing.** CRITICAL
Report accuracy, integration uptime, login success — agree on it upfront.
- ☐ **Assign one point person per department for go-live checks.** RECOMMENDED
Someone confirms their area within the first hour, not the first week.
- ☐ **Draft a communication plan, internal and external.** RECOMMENDED
Include downtime windows and who to contact if something looks off.

Technical Preparation

- ☐ **Document your exact version and build number.** CRITICAL
"Odoo 15-ish" isn't a version — some paths need sequential hops.
- ☐ **Confirm the required upgrade path to your target version.** CRITICAL
Some jumps require intermediate stops, not a direct leap.
- ☐ **Check Python and dependency compatibility.** CRITICAL
Newer Odoo versions often need newer Python and library versions.
- ☐ **List every custom module — including forgotten ones.** CRITICAL
Dormant modules still get processed during migration.

Database Preparation

- ☐ **Run a health check for orphaned records and broken foreign keys.** CRITICAL
- ☐ **Vacuum and reindex PostgreSQL before migrating.** RECOMMENDED
A bloated database is more likely to hit timeout errors.
- ☐ **Remove duplicate and stale data.** RECOMMENDED
Migrating garbage data just moves the garbage to a new version.
- ☐ **Check for oversized log tables that slow migration down.** RECOMMENDED

Security

- ☐ **Document current roles and permissions as a baseline.** CRITICAL
Migrations occasionally reset or misalign access rights.
- ☐ **Run a full access rights audit before migrating.** CRITICAL
- ☐ **Confirm integration credentials and API keys are current.** RECOMMENDED

Backups

- ☐ **Confirm backup covers the full database plus filestore.** CRITICAL
Attachments and images live separately — losing them is common and avoidable.
- ☐ **Test-restore the backup in a sandbox before migration day.** CRITICAL
- ☐ **Store a copy of the backup outside the production environment.** RECOMMENDED

Infrastructure

- ☐ **Confirm server resources meet the target version's requirements.** CRITICAL
Applies if you're self-hosted.
- ☐ **Confirm your hosting plan tier supports the target version.** CRITICAL
Odoo.sh or other managed hosting.
- ☐ **Check disk space headroom for logs and temp files.** RECOMMENDED

Custom Modules

- ☐ **Review, line by line, any module overriding core methods.** CRITICAL
The single most common source of post-migration breakage.
- ☐ **Check custom fields, inherited models, and modified views against the target changelog.** CRITICAL
- ☐ **Flag modules with no active maintainer for extra scrutiny.** RECOMMENDED

Third-Party Integrations

- ☐ **Inventory every system connected via XML-RPC, JSON-RPC, or connector.** CRITICAL
Accounting software, e-commerce, shipping APIs.
- ☐ **Confirm each paid app has a version built for your target release.** CRITICAL
"Should probably still work" isn't a plan.
- ☐ **Check OCA modules specifically — they often lag official compatibility.** CRITICAL
- ☐ **Test each integration endpoint in the sandbox, not just in documentation.** RECOMMENDED

Migration Day Checklist

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A migration that "completes without errors" and a migration that's actually correct are two different things. This is the sequence that catches the difference.

Before Migration

- Freeze all production changes ahead of the window.
- Take a final backup immediately before cutover.
- Confirm the rollback plan is documented, tested, and has a named owner.
- Notify users the freeze is in effect.

During Migration

- Run the migration in the lowest-traffic window available.
- Monitor logs in real time — don't wait for a completion message.
- Keep rollback trigger conditions visible to the whole team.
- Log issues as they appear; don't patch the live system mid-run.

Immediately After Migration

- Confirm the system is reachable and login works before anything else.
- Have each functional point person check their own module.
- Compare user roles against your pre-migration audit.
- Watch server load for the first hour, not just the first ten minutes.

Database Validation

- Confirm record counts match pre-migration baselines.
- Spot-check high-value records manually — recent invoices, open orders.
- Confirm no orphaned or duplicated records were introduced.

Application Testing

- Inventory — stock levels, valuation, and reorder rules match.
- Accounting — chart of accounts, tax rules, reconciliation are accurate.
- CRM — lead assignment and pipeline stages carried over correctly.
- Sales — pricelists, quotations, and order workflows behave as expected.
- Reports — dashboards render and calculate correctly.

User Verification

- Confirm every user can log in with existing credentials.
- Confirm access rights exactly match the pre-migration baseline.
- Ask two or three real users to run a real transaction, not just log in.

Performance Validation

- Compare page load and report speed against the pre-migration baseline.
- Check for slow queries under real, not synthetic, load.
- Confirm scheduled jobs and automated actions are still firing.

Rollback Readiness

- Confirm rollback can execute within your acceptable downtime window.
- Confirm who has authority to trigger it, and how quickly.

Emergency Actions

- Keep hosting provider and Odoo partner contacts on standby.
- Have a status-update template ready if go-live runs long.

Expert tip: Run this entire sequence against a sandbox copy of production first, always. Never let the first real compatibility test happen on your live database.

Post-Migration Checklist

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The work isn't done when the migration finishes. The first two weeks decide whether small issues get caught early or turn into support tickets.

- ☐ **Performance** **Monitoring**
Track response times and server load daily for the first week — slow queries surface only under real usage.
- ☐ **User Acceptance**
Collect structured feedback from real users in week one; they find edge cases faster than any test plan.
- ☐ **Bug** **Tracking**
Log every issue systematically instead of fixing things ad hoc as they're reported.
- ☐ **Security Validation**
Re-run the access rights review to confirm nothing shifted during migration.

- ☐ **Backup Verification**
Confirm backups are actually running on the new version, not just scheduled.
- ☐ **Documentation**
Update SOPs and process docs to reflect any workflow changes.
- ☐ **Optimization**
Review week-one performance data and tune slow reports or queries.
- ☐ **Training**
Run a short refresher once real usage surfaces confusion points.

Top 10 Common Odoo Migration Mistakes

Mistake	Why It Happens	How to Avoid It
1 Treating the checklist as optional for "simple" migrations	The version jump seems small, and current stability feels like proof.	Run the full checklist regardless of version distance — small jumps still break custom modules and third-party apps.
2 Skipping the sandbox test	Sandbox setup feels like extra work when production seems stable.	Always mirror production in a sandbox before touching the live database. Stability today doesn't predict compatibility tomorrow.
3 Backing up the database but not the filestore	The filestore lives separately and is easy to forget.	Confirm your backup process explicitly captures both the database dump and the filestore.
4 Assuming OCA and third-party modules are automatically compatible	These modules often lag behind official Odoo release cycles.	Check compatibility for each module individually against your target version before migrating.
5 Underestimating testing time	Migration itself feels like the "real" work, so testing gets scheduled as an afterthought.	Budget more time for testing than for the migration itself — it usually needs more, not less.
6 No defined rollback trigger	Rollback is "planned," but the exact conditions that trigger it were never agreed on.	Write down the specific thresholds that mean "roll back now" before go-live, not during it.
7 Auditing modules with a five-minute glance	Dormant modules are assumed harmless because nobody remembers installing them.	Pull the full installed-apps list and review every entry, active or not.
8 Migrating dirty data	Data cleanup feels optional when the business "already knows" the data is messy.	Remove duplicate and orphaned records before migration, not after.
9 No point person for post-migration verification	Everyone assumes IT will	Assign a named owner per department to verify their area
10 Treating "no errors" as "migration successful"	The absence of error messages feels like confirmation of correctness.	Test against the full functional checklist — inventory, accounting, CRM, reports — not just the migration log.

Migration Readiness Scorecard

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Answer Yes or No to each question. Count your "Yes" answers and check your score against the guide below before you commit to a migration date.

Business (3)

1. Have you defined measurable success criteria for this migration? Yes / No
2. Has the timeline been confirmed with all affected departments? Yes / No
3. Is a communication plan in place for internal and external users? Yes / No

Technical (4)

4. Do you know your exact current version and build number? Yes / No
5. Have you confirmed the required upgrade path? Yes / No
6. Have you checked Python and dependency compatibility? Yes / No
7. Has every custom module been reviewed against the target changelog? Yes / No

Database (3)

8. Have you run a health check for orphaned or broken records? Yes / No
9. Has your database been vacuumed and reindexed? Yes / No
10. Have duplicate and stale records been removed? Yes / No

Security (3)

11. Have you documented current roles and permissions as a baseline? Yes / No
12. Has a full access rights audit been completed pre-migration? Yes / No
13. Are all integration credentials and API keys current? Yes / No

Infrastructure (3)

14. Does your server or hosting plan meet the target version's requirements? Yes / No
15. Have you confirmed adequate disk space for logs and temp files? Yes / No
16. Have you tested restoring a backup in a sandbox environment? Yes / No

Modules (4)

17. Have all Enterprise, Community, and OCA apps been checked for compatibility? Yes / No
18. Has every paid third-party app been confirmed for your target release? Yes / No
19. Have all integrations been tested in a sandbox? Yes / No
20. Is your rollback plan documented with a clearly defined trigger? Yes / No

0-8

High Risk
Do not set a date yet

9-14

Needs Preparation
Close the gaps first

15-18

Almost Ready
Finish remaining items

19-20

Migration Ready
Proceed with confidence

Migration Risk Matrix

Risk	Business Impact	Likelihood	Mitigation	Priority
Custom module breaks on upgrade	High	Medium	Line-by-line review against target changelog in a sandbox	Critical
Integration stops syncing data	High	Medium	Test every endpoint in sandbox before go-live	Critical
Data loss from incomplete backup	High	Low	Confirm database + filestore backup, test-restore it	Critical
Downtime extends past window	Medium	Medium	Define rollback trigger and lowest-traffic window in advance	High
Access rights misaligned post-migration	Medium	Medium	Document baseline, re-audit immediately after migration	High
Report or dashboard inaccuracies	Medium	Medium	Run the full functional testing checklist before sign-off	Medium
Low user adoption after go-live	Low	High	Schedule training before go-live, not after	Medium

Need Expert Help With Your Odoo Migration?

A checklist gets you most of the way there. The remaining distance — the edge case in your specific module stack, the integration that only breaks under real load, the rollback call made under pressure — is where migrations that "should have been simple" go wrong.

Read Complete Guide - [Odoo Migration Service](#)

Odiware works exclusively on Odoo implementations, integrations, and migrations. This checklist reflects patterns we see repeatedly across real projects, not general theory — and if your environment runs extensive custom modules or several third-party integrations, this is usually the point where a professional review pays for itself.

Why Businesses Choose Odiware

✓ Certified Odoo Experts

Consultants who work on Odoo migrations full-time, not as a side offering.

✓ Migration Planning

A documented, sequenced plan built around your specific module stack.

✓ Data Integrity

Full audit and cleanup before a single record moves.

✓ Module Compatibility

Line-by-line review of custom code and third-party apps against your target version.

✓ Minimal Downtime

Sandbox-tested cutover sequences designed around your business hours.

✓ Post-Migration Support

Active monitoring and bug triage through the first weeks of real usage.

Book a Free Migration Assessment

Send us your current version, target version, and module list. We'll flag the highest-risk items in your specific environment before you commit to a migration date — no cost, no obligation.

Planning your Odoo migration?
[Book Your Free Assessment →](#)

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