(INCOMPLETE) What should I double check before going live with 1place? (High Level GoLive Checklist)

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Data Conversion - Checklist

Are you converting FROM QuickBooks Online to 1place + QuickBooks Online? (IF Not SKIP THIS STEP)

- Have you **created User Logins for each user** that will need access to 1place?
    - Have you entered and tested the **User Email settings** (so each user can email certain documents like Invoices, PO's, etc?)
    - Have you set up the **View, Add, Edit, Print, and Delete record permission for each screen, for each user**?
    - Have you set up the **report printing permissions for each user**?
    - (If applicable) have you **setup a Warehouse for each of your warehouses**?
- Have you **connected 1place to your QuickBooks Online**?
- Have you **synced your Customers in QuickBooks Online into 1place**?
    - Have you **spot checked the Customers in 1place** do they look like they match the **Customers** in **QuickBooks Online**?
    - Have you **setup and tested the Customer pricing**?
        - If using **Custom Pricing Templates**, have they been hand entered or imported?
    - Have the **Shipped Via's** been setup in 1place and do all Customer records have a Shipped Via?
    - Have the **Pricing Terms** been setup in 1place and do all Customer records have Payment Terms?
- Have you **synced your Vendors in QuickBooks Online into 1place**?
    - When you spot check the **Vendors** in **1place** do they look like they match the **Customers** in **QuickBooks Online**?
- Have you **synced your Items in QuickBooks Online into 1place**?
    - When you spot check the **Items** in **1place** do they look like they match the **Items** in **QuickBooks Online**?
    - Does the **Inventory Value** on your **QuickBooks Online** BALANCE SHEET equal the **Inventory Valuation** in **1place**?
- Have you **synced your Invoices and Credits in QuickBooks Online into 1place**?
    - Do the **Open Invoices and Credits** in **1place** balance to the penny with your **Accounts Receivable** in **QuickBooks Online** (for the same time period)?
- (If applicable) Have any compared the **Quotations list** from **OneSource** with the **Quotations list** in **1place**?
    - You can compare the Excel files, or the**Shift+F5** list in **OneSource** vs the **Shift+F5** list in **1place**.
- Have any **HAND ENTERED any OPEN/Unshipped Sales Orders** from **OneSource** into **1place** (just prior to going Live)?
    - You can view the **Shift+F6** list in **OneSource** vs the **Shift+F6** list in **1place**.
- Have any compared the **OPEN Invoices & Credit Memo's** in **OneSource** with the **Quotations list** in **1place**?
    - You can compare the Excel files, or the**Shift+F7** / **Shift+F8** lists in **OneSource** vs the **Shift+F7** list in **1place**.
    - Does the TOTAL of the unpaid Invoices and Credits (**open Accounts Receivable / AR Report**) in OneSource match the Open Invoices & Credits in 1place (and QuickBooks online) to the penny?
- Have you compared the **Purchase Orders** list from **OneSource** with the **Purchase Orders** list in **1place**?

- You can compare the Excel files, or the **Shift+F9** list in **OneSource** vs the **Shift+F9** list in **1place**.
- Have you compared the **Item list** from **OneSource** with the **Item list** in **1place**?
  - You can compare the Excel files, or the **Shift+F10** list in **OneSource** vs the **Shift+F10** list in **1place**.
- Have you compared (spot checked) the **Item Stock Levels** in **OneSource** vs **1place**?
  - Does the Total of the **Inventory Valuation** balance to the penny between **OneSource** and **1place**?
  - Does the Total of the **Inventory Valuation** balance to the penny between **1place** and the **QuickBooks Online Balance Sheet**, as of the GoLive date?
- Have you compared (spot checked) the **Item Vendor Item Numbers & Costs** between **OneSource** and **1place**?
- (If Applicable) Have you compared (spot checked) the **Item Pricing Matrix** between OneSource and 1place?
- (If Applicable) Have you compared (spot checked) the **Item Assemblies** between OneSource and 1place?
- (If Applicable) Have you compared (spot checked) the **Item Catalog** between OneSource and 1place?
- Assuming you will be setting up QuickBooks Online to track you General Ledger (for Balance Sheet and Profit/Loss Reports), Banking, and Accounts Payable:
  - Have you **set up a new QuickBooks Online account**? (the QuickBooks Online Plus version is typically the best version).
  - Have you **hand entered your General Ledger accounts in QuickBooks Online**?
  - Have you **created a Bank Account for each Bank Account in QuickBooks Online**? (If desired, have you set up online banking to enable your bank to download banking transactions into your version of QuickBooks Online?)
    - Using your most recent Bank Statements **have you balanced each Bank Account**? (Hand enter the Bank Balance as your beginning balance for each account. Then hand entered any outstanding checks, deposits, and adjustments that do not appear on your last bank statement.)
  - Have you **connected 1place to your QuickBooks Online**?
  - Have you **synced your Vendors from 1place into QuickBooks Online**?
  - Have you **hand entered in open (unpaid) AP Bills**?
  - Have you **synced your (Inventory) Items from 1place into QuickBooks Online**?
    - Does the Inventory Value on your QuickBooks Online BALANCE SHEET equal the Inventory Valuation in 1place?
  - Have you **synced your Customers from 1place into QuickBooks Online**?
  - Have you **synced your OPEN (unpaid) AR Invoices and Credits into QuickBooks Online**?
    - Does the Open Invoices and Credits in 1place balance to the penny with your Accounts Receivable in QuickBooks Online (for the same time period)?
  - Does your **Balance Sheet in OneSource look generally correct to you**?
  - Does your **Balance Sheet in OneSource Balance?** (Do Assets = Liabilities + Owners Equity)?
  - Have you **created a (beginning balance) Journal Entry in QuickBooks Online** to make any missing figures on your QuickBooks Online **Balance Sheet** balance to the penny from your OneSource Balance Sheet?

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  - Have you entered and tested the **User Email settings** (so each user can email certain documents like Invoices, PO's, etc?)
  - Have you set up the **View, Add, Edit, Print, and Delete record permission for each screen, for each user**?
  - Have you set up the **report printing permissions for each user**?
- Have you compared the **Customer list** from **OneSource** with the **Customer list** in **1place**?
  - You can compare the Excel files, or the **Shift+F3** list in **OneSource** vs the **Shift+F3** list in **1place**.

    - Is the **Customer pricing** setup and tested?
        - If using **Custom Pricing Templates**, have they been hand entered or imported?
    - Have the **Shipped Via's** been setup in 1place and do all Customer records have a Shipped Via?
    - Have the **Pricing Terms** been setup in 1place and do all Customer records have Payment Terms?
- Have you compared the **Vendor list** from **OneSource** with the **Vendor list** in **1place**?
    - You can compare the Excel files, or the **Shift+F4** list in **OneSource** vs the **Shift+F5** list in **1place**.
- (If applicable) Have any compared the **Quotations list** from **OneSource** with the **Quotations list** in **1place**?
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    - Have you **hand entered your General Ledger accounts in QuickBooks Online**?
    - Have you **created a Bank Account for each Bank Account in QuickBooks Online**? (If desired, have you set up online banking to enable your bank to download banking transactions into your version of QuickBooks Online?)
        - Using your most recent Bank Statements **have you balanced each Bank Account**? (Hand enter the Bank Balance as your beginning balance for each account. Then hand entered any outstanding checks, deposits, and adjustments that do not appear on your last bank statement.)
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Are you converting FROM Another Accounting System to 1place + QuickBooks Online? (IF Not SKIP THIS STEP)

(Please contact OneSource Support for assistance with this).

Are you starting to use 1place + QuickBooks Online from SCRATCH?

(Please contact OneSource Support for assistance with this).

User Hands On Training - Checklist (incomplete)

Have each of your users performed each of the following functions in 1place, (depending on the TYPE of user they are)?

Function	Admin Users	Accounting Users	Managers	Sales / Customer S
Customers				
Login to 1place	x	x	x	x
Add a new Customer (With mouse, and **Ctrl+F3**)	x	x	x	x
Find HELP on the Customers screen. (Help button)				
Find a Customer (with mouse, and **F3**)				
Add a Contact				
View Customer Quotes, Sales Orders, Invoices				
Setup Customer Prices				
View a LIST of Customers (with Mouse, and **Shift+F3**)				
Schedule a Task				
View Task List				
Vendors				
Add a new Vendor (With mouse, and **Ctrl+F4**) Find a Customer (with mouse, and **F3**) Add a Contact Schedule a Task View Task List Setup Customer Prices View Customer Quotes, Sales Orders, Invoices View a LIST of Customers (with Mouse, and **Shift+F3**)				
Find a Vendor (With mouse, and **F4**)				
Add a new Item (With mouse, and **Ctrl+F10**)				
Find an Item (With mouse, and **F10**)				
Create a Purchase Order (With mouse, and **Ctrl+F9**)				
Print a Purchase Order				
Receive items on Purchase Order				
Create a Special Order 'Sales Order PO'				

Most Common Preferences

1place Customizations

- Have all pre-live customizations for OneSource forms, lists, and reports been entered as SR's in the 1place Support Request (SR) system?
- Are there any SR's related to development needs that are still incomplete? If so, what is the approximate delivery date?