

(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 your 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?

Are you converting FROM OneSource 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**?
- 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**?
 - 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)?**

- Have you hand entered in open (unpaid)
- 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?

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 Service Users	Purchasing Users	Warehouse Users
Customers						
Login to 1place	x	x	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?

