1place - Pre-Live Setup Settings (Checklist)

Last Modified on 08/25/2026 6:14 pm EDT

- Users
  - User Logins created.
  - User email settings.
  - User Security (which screens WILL or WILL NOT be visible).
- Inventory
  - New Item defaults
  - Item Pricing Levels
  - Item Detail screen tabs and fields
  - Auto Body Supply Parts?
    - Setup PTypes table on Catalog Manager screen.
- Purchasing
  - What will the Starting PO# be?
  - How to handle when PO Cost is changed. (Yes auto change, No do not change, or Prompt user)
  - Sort PO line items. (Alpha, or entry order)
  - Prompt user to auto create AP Bill in QuickBooks when PO is received. (Yes or no)
  - # of Decimal places for PO price fields.
  - When List Price on PO is changed, will the Item List price be auto updated? (Set to Yes, No, prompt).
- Customer
  - Address Types set up? (Bill To, Ship To, or Both)
  - Customer Default Pricing.
  - Customer Custom Pricing?
  - Tax Codes updated?
  - Tax Except fields updated?
  - Customers have default Payment Terms?
  - Customers have default Shipped Via?
- Sales
  - Sales Transaction #'s. (What will the Starting #'s be for Quotes, Sales Orders, Invoices, Credit Memos)
  - Sales Order Statuses?
    - Will Pick Tickets be printed on Sales Order? Or Shipping & Receiving screen?
  - Format Stock Picking Ticket
    - Do we have a Company Logo we can use?
  - Format printed Sales Order
  - Format printed Invoice
  - Format printed Credit Memo
- QuickBooks Online Integration
  - Proper settings for Items and Customers
  - Open (unpaid) Invoices ready to be synced (and to bring the OPEN AR account UP in QBO)
  - Open (unreceived) POs ready to be synced
  - Connection to QBO created.
  - Settings on Sync screen (default QBO GL Accounts)
  - Beginning Balance Journal Entries entered.