

# 1place - Pre-Live Setup Settings (Checklist)

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- 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.
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