Onboarding Checklist

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OrderTime

Onboarding Checklist

Please read this checklist in its entirety

- Do you want to import records such as customers, items and vendors from QuickBooks or Xero?
  - Yes: See Accounting Integration
  - No: See Importing Records

Preferences

- Do you sell in foreign currency?
  - If yes, see enable foreign currency and set up currencies. Currencies are assigned to customers and vendors.
- Do you buy, sell or use the same product in different units of measure?
  - For example; selling in 'each' and buying in 'cases'. If yes, see enable multiple units of measure and set up units of measure. Units of measure are used when setting up items.

Roles and Users

- Roles allow you to set access levels for your users. You can even set access levels at the field level.
  - Adding Users and Assigning Roles
  - Set up Roles

Custom Fields

- As you go through the check list below you may find you need additional fields. You can set up a custom field to add the additional information and calculations that you need for your business workflow.
  - Custom Fields & Calculated Fields
  - Webinar - Custom & Calculated Fields

Profile List

Profile Lists are helper or lookup lists (for example Vendor Type). Populate these lists as needed for your implementation.

1. Do you want to categorize your vendors? (Vendor Types)
2. What terms do you get or give to customer and vendors? (Terms and Payment Methods)
3. Do you need to measure how items are purchased? Units of Measure and UOM Sets
4. Do you want to categorize your items? (Item Groups and Selecting an Item Group)
5. Do you want to categorize your Customers? (Customer Types)
6. Do you give customers special pricing? (Price Levels, Adding Price Levels, Types of Price Levels)
7. Which shipping methods do you use? (Ship Methods)

Locations

- Do you store inventory in more than one location? (Set Up Locations)
- Within a location do you use bins or areas within a warehouse to store inventory? (Set Up Bin Locations)

Vendors

- Vendors are businesses or people that sell you products and services.
  - You should set up one or more vendors in order to create purchase orders and receive inventory.

Customers and Leads

- Customers are businesses or people that buy products and services from you.
  - A lead is a prospective customer.
  - You should set up at least one customer so you can create sales orders, quotes and ship docs.

Ship To Addresses

- Customers and Leads can have multiple Ship To addresses.
  - One default ship to address is created for each customer.

Contacts

- A customer or lead can have multiple Contacts.
  - You can indicate the Contact on Sales Orders and Quotes.
  - Default Contact properties include: First & Last Name, Phone Number, Email Address, Position/Job Title, etc.

Items

- Items are products, services and other charges that you buy, sell or otherwise consume.
    - The Item Type dictates its behavior in Order Time.
    - Find out more about Items in Order Time.
    - The Type is system defined, however you can create Item Groups, which 'inherit' the behavior of their Type.
- The Type of item will depend on the nature of your business.
    - If you are a wholesaler, retailer or a manufacturer that outsources production, you will create mostly Parts.
    - You may also need Services, Kits and Other Charge items (e.g. Shipping).
    - If you are a manufacturer that does some assembly or production you will create mostly Parts for components, raw materials and Assemblies.
    - Before creating the assembly items, create or import the components and raw materials.
- Will you need Item Aliases

Tracking Lots or Serial Numbers

- Do you want to track serial or lot numbers? (when creating a part or assembly check the box)
    - Company Preferences - Lot Numbers & Serial Numbers

Item Variations

- Order Time can help you create and maintain items with variations such as size and color using the Styles Editor.

Kits and Configurations

- A Kit is a container for a group of items that are sold together (also known as bundles).
    - With a kit structure you can offer options for your customers when creating quotes and sales orders.
    - Creating a Kit
    - Kit and Configurable Bill of Materials
    - A configuration is an assembly item with options.

Item and Vendors

- An item can have multiple vendors with different part numbers, cost and lead times.
- The Standard Cost (Std. Cost) on an item should be in your home currency and be based on the primary unit of measure.
- The cost listed on Item Vendors should be in the vendors currency and in the 'purchase as' unit or measure if different than the primary unit of measure.

Form and Email Templates

- Use Form Templates to design what your documents like sales orders and quotes will look like.
    - Overview - Form Template
    - Designing - Form Template
- Use Email Templates to design your outbound emails for consistent communication to customers and vendors.

- Email Templates
- Video - Creating Email Templates

During the 30 day trial period sending email is disabled. Contact us at support@ordertime.com and we can verify your identity to enable this feature in your trial sandbox.

Opening Inventory

- The easiest way to establish an opening inventory is to create one or more counts for each location.
  - You can import your current inventory into the count. Once completed, finalize the count into inventory.
  - Import Your Opening Inventory - Ultimate Guide
  - Generate a Cycle Count

Setting Up Your Go Live Plan

- At this point you have decided to use Order Time as your system of choice; fantastic! You have already:
  - Started your trial
  - Done an initial sync with accounting, if applicable
  - Started to customize your forms, email templates, reports etc.
  - Created test transactions
- Now it's time to plan to Go Live.
  - Do you have a go live date in mind?
  - We need to know at least 2 weeks in advance!
  - You inform us by scheduling a time with one of our onboarding specialists.

Head to this article to schedule your planning meeting: **Planning to Go Live**