

# Planning to Go Live

Last Modified on 05/30/2024 3:31 pm EDT

## 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 Form Templates, Email Templates, Reports etc. ✓
- Created test transactions ✓
  - Accounting
  - Ecommerce
  - Any additional integrations

Now it's time to plan to **Go Live!** The next steps you need to consider are:

- 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.

## Go Live Planning Meeting

At least 2 weeks prior to your Go Live date, you will schedule a meeting with one of our Onboarding Specialists. From then on, the Onboarding Specialist will be your "go-to" Order Time point of contact until you are live. During the Go Live Planning Meeting we will:

- Review your trial file for preparedness to go live and make recommendations such as:
  - Determining what integrations are needed and any impact on Go Live Date
  - Confirming necessary Company Preferences have been reviewed and selected
  - Evaluating foundational processes have been set up such as Chart of Accounts, Ship Methods, Tax Items, etc. by reviewing the Onboarding Checklist
    - **Onboarding Checklist**
- Discuss deleting test records
  - Determining what data within your trial account that needs to be kept/deleted
- Discuss re-syncing with accounting, if applicable
  - Our Integration Specialist may be needed and availability could impact the Go Live Date
- Schedule training
  - Schedule with our Training Specialists to review any Order Time processes so that Go Live is successful



**Depending on the results of the Go Live Planning Meeting, an alternative Go Live date may be suggested to ensure success.**

By setting and confirming the Go Live date, our team will be prepared to provide you with any needed assistance, during your transition to Order Time.

## Schedule your Planning Meeting

To schedule your Go Live Planning meeting, please reach out to [kimk@ordertime.com](mailto:kimk@ordertime.com)