

Planning to Go Live

Last Modified on 04/30/2025 5:13 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 [**kaitlyn.tolson@ordertime.com**](mailto:kaitlyn.tolson@ordertime.com)