

Go Live Checklist

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Go Live Checklist To make your conversion to the New Software a smooth and successful transition, follow the checklist below to ensure that you, your staff and your software are ready for your planned Go Live. There are **Critical** activities to ensure you are ready for your Go Live. These items are marked as **Critical** and must be completed prior to your Go Live. There are **Optional** activities. These items are marked as **Optional** and can be entered at any time before or after your Go Live, as desired. All remaining activities should be entered in order to make a smooth conversion to your new software.

----- **Inventory counts & value of inventory - Critical** Make sure ALL Inventory (stocking items) have been entered, stocked at the Location level and counted (Recounts) prior to your Go Live date. Make sure ALL Consignment Inventory has been entered, stocked and opening balances are completed prior to your Go Live date. **Do not Recount the Consignment Inventory for opening balances.** Follow the procedures as described in Help under Frequently Asked Questions, Inventory, #2 [How do I setup and manage consignment at http://www.protractor.com/flashhelp_tours/consignment.pdf](http://www.protractor.com/flashhelp_tours/consignment.pdf) To verify Total Value of Inventory use GL Account # 1420 Materials. **Return Good Credits - Critical** Process as many Return Good Credits as possible prior to your Go Live Date. Any remaining Return Good items that you have not received Supplier Credit for must be entered as opening balances. Follow the procedures as described in Help under Frequently Asked Questions, Accounting, #1 How do I enter opening balances? #4 [Enter Returned Goods waiting for credit at http://www.protractor.com/flashhelp_tours/RGBOpeningBalances.pdf](http://www.protractor.com/flashhelp_tours/RGBOpeningBalances.pdf) **Work In Progress - Critical** Any and All Work In Progress jobs must be recreated in the New Software if not completed prior to your Go Live date. Any parts (non inventory) on Work In Progress that have been purchased prior to your Go Live date will be entered with a \$0.00 cost. The cost for these parts will be entered as a Payable Opening Balance. It will be in your best interest to enter the Supplier and Supplier Invoice # for these parts. **Cash Balance - Critical** All monies should be deposited the day prior to your Go Live. This will include all Credit Card receipts, checks and cash on hand, except for your Cash float / Petty Cash. You will need to start the day of your Go Live with only the Cash Float / Petty Cash in the Cash Balance. **All Default Setting under the Tool Menu should be set and configured** **Enterprise / Setup** **Master Method of Payments - Critical** **Other Charges - Critical** **Contact Categories - Optional** **Unit Conversion Formula - Optional** **Location** **Location Defaults - Critical** **Labor Rates - Critical** **Method of Payment - Critical** **Other Charges - Critical** **Employee Payroll Details - Optional** **Available hours - Optional** **Time Clock Custom Events - Optional** **Bank Accounts - Critical** **General Ledger Accounts - Optional** **Catalog Setup - Optional** **Sell Price Defaults - Critical** **Work Order Designer - Critical** **Work Order Formatting - Critical** **Document Comments - Critical** **CRM Setup - Optional** **Workstation** **Workstation Defaults** **Contacts - Optional** **Appointments - Optional** **Messages (multi-user only) - Optional** **Spell Check - Optional** **Work Order - Optional** **Catalog / Time - Critical** **Email - Optional** **Auto Replace - Optional** **All Employees should be entered and Contact Categories set - Critical** **Employee System Security should be setup - Optional** **All Suppliers should be entered and Contact Categories set - Critical** **The Cash Float / Petty Cash opening balance should be entered - Critical** Follow the procedures as described in Help under Frequently Asked Questions, Accounting, #1 How do I enter opening balances? #6 [Enter Cash Float at http://www.protractor.com/flashhelp_tours/CashFloatOpeningBalances.pdf](http://www.protractor.com/flashhelp_tours/CashFloatOpeningBalances.pdf) **All Service Offerings should be setup and copied to the Location - Critical** **Service Packages** **Pinpoint Inspections** **Common Complaints** **Employees should be training and fluent with the following procedures, as per their individual job duties - Critical** **Entering New Contacts and Vehicles.** **Writing Repair Orders (New Work Wizard).** **Processing Repair Orders** **Invoice Posting Procedures.** **Ordering and Receiving parts from suppliers.** **Receiving inventory stock and stock orders.** **Cash Drawer functions.** **Customer Payments on Account** **Cash Paid Out** **Payment To Supplier** **Daily procedures.** **End Shift** **Cash Balance** **Prepare Bank Deposit** **Reports** **Scheduling.** **Time Clock functions.** **Account Receivables management.** **Account Payables management.** **Bank Accounts** **Writing and Printing Checks.** **Bank Reconciliation.**

Â·Payroll Entries. Â·Tax Remittance. Â·General Ledger.

Posted by: [Tim McDonnell](#) - Thu, Mar 24, 2011 at 10:49 AM. This article has been viewed 2891 times.

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