UNLEASHED

CHECKLIST

# Unleashed Onboarding Checklist

Track your progress through the implementation process

## COMPANY SETTINGS

- [ ] Complete Company Details
- [ ] Upload All Images
- [ ] Enable Batch Tracking
- [ ] Enable serialized Product
- [ ] Select Dashboard Data Source

## SYSTEM SETTINGS

- [ ] Enter Attribute Sets
- [ ] Enter Prefixes
- [ ] Enter Adjustment Reasons
- [ ] Enter Credit Reasons
- [ ] Enter Currency Rates (if multi-currency enabled)
- [ ] Enter Customer Types
- [ ] Enter Delivery Methods
- [ ] Enter Product Groups (if not included on the import data)
- [ ] Enter Sales Invoice Groups
- [ ] Enter Payment Terms
- [ ] Enter Salespersons
- [ ] Enter Sell Price Tiers
- [ ] Enter Shipping Companies
- [ ] Enter Supplier Return Reasons
- [ ] Review taxes (of configure if not connected to Accounting software)
- [ ] Enter Units of Measure
- [ ] Enter Warehouse (if multi-warehouse enabled)

## CONNECT TO ACCOUNT SOFTWARE

- [ ] Confirm Chart of Accounts
- [ ] Confirm tax codes
- [ ] Confirm base currency (if using multi-currency)
- [ ] Authorise Unleashed/Accounting connection
- [ ] Specify sales, COGS and SOF accounts in Unleashed
- [ ] Select export options
- [ ] Configure Unleashed Settings

## IMPORT EXISTING DATA

- [ ] Review and cleanse customer master data file
- [ ] Review and cleanse supplier master data file
- [ ] Review and cleanse product master data file
- [ ] Import customer using CSV template, sync Accounting software or
- [ ] Create manually
- [ ] Import suppliers using CSV templates, sync Accounting software or create manually
- [ ] Import product using CSV template or create manually
- [ ] Import stock on hand using CSV template or enter manually as stock adjustment

## DOCUMENT DESIGNER

- [ ] Gather document requirements and examples
- [ ] Upload logo (Company Settings)
- [ ] Design document templates

## SECURITY

- [ ] Define User Roles and access requirements
- [ ] Setup Users

## ADD NEW ACCOUNT SETTINGS

- [ ] Create Sandbox
- [ ] Invite Users to Sandbox