
Install Checklist

1. Contracts

- 1.1 Contracts Signed and Approved
- 1.2 Wire Deposit
- 1.3 (SPS) License File Generation
- 1.4 Credit card setup for hosting fees

2. Server and System Installation

- 2.1 (SPS) Install License File
- 2.2 (SPS) Client entered into SPS support system
- 2.3 (SPS) Setup basic system defaults - [page 09](#)
(Bar-Code prefix, Company Details)
- 2.4 (SPS) Setup System URL
- 2.5 Set up Control Switches - [page 13](#)

3. Static Data Migration - [page 19](#)

- 3.1 Chart of Accounts
- 3.2 Customers
- 3.3 Item Master
- 3.4 Services Master *
- 3.5 Inventory Suppliers
- 3.6 Non Inventory Vendors
- 3.7 Associates
- 3.8 Contacts
- 3.9 Price List *
- 3.10 Tax Codes
- 3.11 Zip Codes

4. Training - [page 43](#)

- 4.1 Admin and System Setup
(User Admin, System Terminology, Terms, Package Setup)
- 4.2 Purchasing & Master List
(PO's, Supplier Invoice/Packing List, Inventory Receipts, Freight, and Landed Costs)
- 4.3 Inventory
(Inventory Search, Adjustments, Transfers, Product Master List)
- 4.4 Pre-Sales
(Opportunities, Quotes, Visits, Sample Orders, Transfers)

(SPS) = Stone Profit Systems Task

* If Applicable - Fabricator Items

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- 4.5 Sales
(Sales Orders, Job Tracking, Job Scheduling, Invoicing, Pick Tickets, Packing List)
 - 4.6 Scheduling *
(Calendar Views, Dashboards, Resources, Events and Event Types)
 - 4.7 Accounting & Reports
(AR, AP, Banking, General Ledger, System Reports)

5. Add-On Modules

6. System Configuration and Setup

- 6.1 User Types and User Setup
- 6.2 Quote Package Setup *
- 6.3 Job Scheduling Setup *
- 6.4 Print Documents Format and Policies Setup - page 47
(Quote, sale order, invoice, PO)
- 6.5 Bar-Code Setup - page 65
- 6.6 Send Void Business Check For Setup
- 6.7 Fax Setup *
(Requires efax, rightfax, or similar online fax account)

7. Dynamic Data Migration - page 75

- 7.1 Inventory Details
(Slabs and non-slabs)
- 7.2 Open AR Invoices
(Open customer Invoice details)
- 7.3 Open AR Receipts
(Open customer Payment/Receipts details)
- 7.4 Open AP
(Open vendor Invoice details)
- 7.5 Trial Balance
(Debit or credit balances in different accounts)

8. Go Live

- 8.1 (SPS) Additional Support on Go Live Date
- 8.2 Customer Satisfaction Report and Sign Off
- 8.3 Wire Remaining Balance
- 8.4 Credit Card Setup for Support and Maintenance

(SPS) = Stone Profit Systems Task

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