Implementation Check List

I certify that I and my staff can and have performed each task listed below.

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✓		System-Wide Tasks
1		Input/change company address
2		Change origination email address
3		Upload company logo
4		Enter/edit cut-off times for orders
5		Customize default settings for host
6		Customize default settings for remote
7		Add/change system users
8		Detirmine what invoice form to use
9		Add/change units of measure
10		Add/change production dept.
11		Add/edit system comments for invoices
12		Add/edit packing methods
13		Assign packing methods to customers
14		Add reasons for product returns
15		Create item misc. codes
16		Create customer misc. codes
17		Access electronic manual (orange book)
18		Print database in list format
19		Add/edit item category
20		Add/edit items, incl. expanded file
21		Change item prices by batch
22		Add/edit customer cateogry
23		Add/edit customers incl. expanded file
24		Add/edit ship to information
25		Add/edit a customer's standing orders
26		Add/edit a customer's order templates
27		Add/edit a customer's special pricing
28		Add/edit routes
29		Assign routes to customers
30		Add/edit salespersons and commisions
31		Assign Salespersons to customers
32		Manage ship-to locations & sequences
33		Assign commision % per route
34		Add vendors
35		Memorize report configuration

✓		Sales Order Module Tasks
36		Generate standing orders
37		Enter orders from phone, fax, or email
38		Change orders
39		Import orders from remote
40		Void or cancel orders
41		Print sales orders/delivery tickets
42		Print packing labels
43		Mark orders as shipped/delivered
44		Make after delivery adjustments
45		Post orders to accounts receivable
46		Print production reports
47		
48		
49		

✓		Remote Module Tasks
50		Allow a customer to use Remote
51		Enter order using recurring
52		Enter order using sale template
53		Edit an existing order
54		Edit weekly recurring orders
55		Pay outstanding bills
56		Print aging and statement
57		Print order guide
58		Import orders from Remote to Host
59		Allow customer access to "dynamic" item list
60		Upload static price list in PDF

Implementation Check List

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✔	**Accounts Receivable Module Tasks**
61	Print invoices
62	Print customer statements
63	Edit invoice headers
64	Enter payments
65	Enter one payment for many customers
66	Add & apply credit memos
67	Add & apply debit memos
68	Remove payments
69	Assign & change payment terms
70	Assign credit limit to customers
71	View payments, sales, and bal. in cust. file
72	Run Sales Analysis by customer
73	Run Sales Analysis by item
74	Run open receivable aging report
75	Run products ordered vs delivered report
76	Run reasons for returns report
77	Run commision reports
78	Run payments register
79	
80	
81	

✔	**Inventory Module Tasks**
82	Add ingredients
83	Add unfinished doughs
84	Add recipes to finished and unfinshed items
85	Change ingredient & packing costs
86	Enter purchases as adjustments
87	Enter wasteages
88	Perform physical count
89	Create production lists from orders
90	Adjust production lists
91	"Process" production list
92	Run costing reports to correctly price items
93	Run production via inventory with recipes
94	Run inventory reports

✔	**Purchase Order Module Tasks**
95	Create purchase order
96	Print or Email purchase orders to vendors
97	Void or cancel purchase orders
98	Receive purchase orders
99	Create RMA to vendor
100	Run purchase order reports