![Unleashed logo]

Unleashed Flightpath Checklist

Track your progress through the Flightpath process.

> ⓘ **Click on the links highlighted in red to be taken to the help file**

FIRST STEPS & COMPANY SETTINGS

- ☐ Check your account for trial data. If you have data that needs to be deleted, let your customer success consultant know
- ☐ Go to your company settings and fill out your general details
- ☐ On the Configuration tab, select the features you need
- ☐ Input your address and contact details
- ☐ Add your company logo on the images tab
- ☐ Enter your footer details for invoicing and purchasing
- ☐ Add your email templates for any transactions you'll be using Unleashed for

Security Settings

- ☐ Add your Users
- ☐ Add your User roles and Set permissions for each role

System Settings

Please note, not all settings will be applicable to every customer. Utilise these based on your individual business requirements.

> ⓘ **It is important to check all settings before you begin transactions within Unleashed**

- ☐ Enter Assembly Statuses
- ☐ Enter Adjustment Reasons
- ☐ Enter Attribute Sets
- ☐ Enter Automated Notifications
- ☐ Enter Credit Reasons
- ☐ Enter Currency Rates (if multi-currency is enabled)
- ☐ Enter Customer Types
- ☐ Enter Delivery Methods
- ☐ Enter Prefixes
- ☐ Enter Product Groups (if not included on the import data)
- ☐ Enter Payment Terms
- ☐ Enter Sales Groups
- ☐ Enter Sales Order Statuses
- ☐ Enter Sales Persons
- ☐ Enter Sell Price Tiers
- ☐ Enter Shipping Companies
- ☐ Enter Supplier Return Reasons
- ☐ Review Taxes (or configure if not connected to accounting software)
- ☐ Enter Units of Measure
- ☐ Enter Warehouses (if multi-warehouse is enabled)

Connect to Accounting Software

- ☐ Turn on integration and sign in to accounting software, authorize Unleashed Software
- ☐ Link your Default Sales Account, COGS Account and Stock on Hand Account
- ☐ Auto sync your tax codes and map to transactions
- ☐ Select export options
- ☐ Disable this connection until your Go Live Date

> ⓘ **You should turn off this integration until you go live**

Import Existing Data

- ☐ Export suppliers from current system, cleanse and enter into Unleashed template save and import into Unleashed
- ☐ Export customers from current system, cleanse and enter into Unleashed template save and import into Unleashed
- ☐ Export products from current system, cleanse and enter into Unleashed template. Pay special attention to assembled, component, batch, serial, pricing if you require these features. Import into Unleashed
- ☐ If required, cleanse Bill of Materials data, enter into Unleashed template and import into Unleashed

> ⓘ **Please note: Import of stock on hand should be conducted on your GO LIVE date**

Document Designer

- ☐ Review which transaction documents you'll need
- ☐ If you are not happy with defaults, duplicate and amend as needed

Sandbox

- ☐ Create Sandbox
- ☐ Test all relevant transactions
- ☐ Test all integrations
- ☐ Map out your new processes

Go Live Steps

Once you and your team are fully comfortable with using Unleashed, you are ready to go live!

- ☐ Import your stock on hand using the stock on hand template
- ☐ Turn your accounting integration on, and ensure your Stock on Hand current asset account is the same value as the total cost of stock in Unleashed
- ☐ Connect up any other integrations in your live account