

# 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