



# Store Setup Checklist

FOLLOW THESE STEPS FOR A SUCCESSFUL ROLLOUT

## Things to consider when setting up the store:

- Will you use barcodes on your inventory?
- Will you track sales by family account, a general store account, or both?
- Do you have an inventory list you would like to import into your database?
- Do you want to use a credit card swipe reader for Store payment?

Use this checklist and complete the tasks to set up your Store:

- Review and update the [User Permissions required for the Store](#) for all Users.
- Determine the [Drop-down List](#) values to use for the Store and add new values if desired.
  - Class Category 1
  - Item Tax Rates
  - Quick Discounts
  - Transaction Types / SubTypes
- Add [item Vendors](#) to the Store.
- Add [Items](#) to the Store.
  - Contact our [Imports Team](#) for assistance with importing existing inventory data.

Optional:

- Use Item Barcodes for Store Items.  
Two methods:
  - Download and use [pre-formatted barcodes 1000-5000](#).
  - Create barcodes with [barcode software](#).
- Add [additional Store accounts](#) or deactivate Store accounts.