

UNBOX

ERP and CRM solutions

Kick-Off





Introduce team members

- **Armando: Account Manager**
- **Aimee: Project Manager**
- **Isela: Administration**



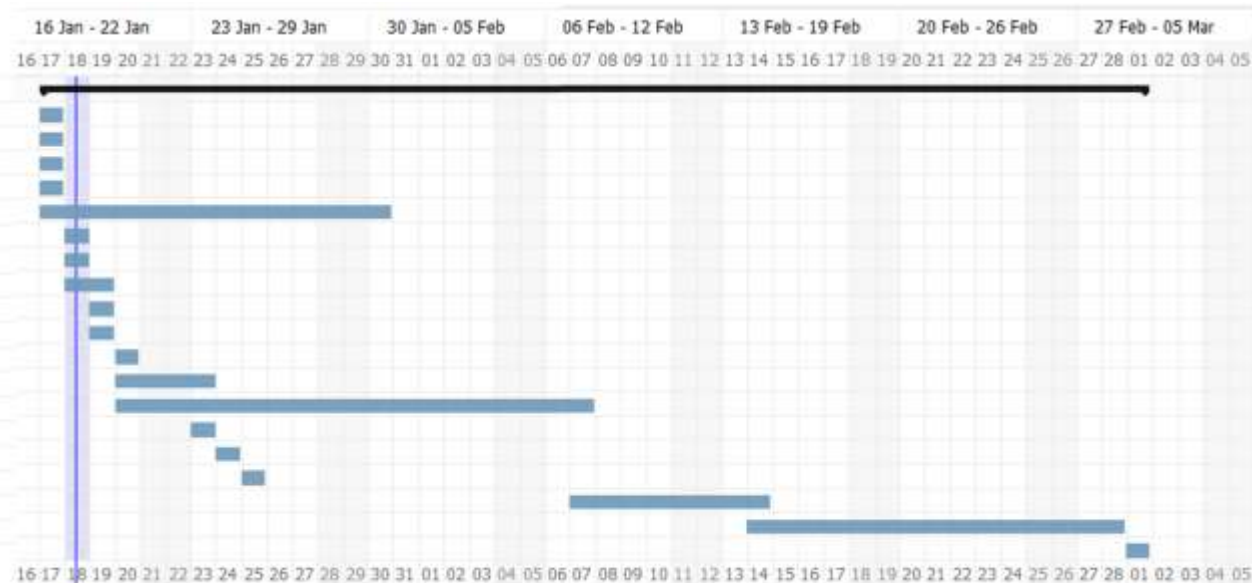
Introduce team members

- **Ross: Fusion Brand General Manager**
- **Cole: Operations**
- **Celeste: Invoicing and Accounting**
- **Erich: IT Consulting**

Project schedule

- PROJ221109-00196 Dolibarr Implementation

TK2301-0348 - Preparation Setup Meeting
TK2301-0349 - Send Minute with agreements and pending tasks -Attach Products, Third Parties and Email templates and Setup Document, Core Business email
TK2301-0352 - Import CSV (SKU and Quantitv) into a Sales Order - Including file with all fields Dolibarr needs
TK2301-0353 - Sort on Sales Order PDF based on Priority (Manufactured Products LE Laser Etched / DP Digital Print (Customized field)
TK2301-0360 - Notification Standard from Sales order to the people who upload the art file (Applies if this is an Extra field)
TK2301-0354 - PDF Notes and features column
TK2301-0355 - PDF Confirmation Order or Order/Picking List (SKU + Qty)
TK2301-0350 - DOLIBARR SETUP
TK2301-0356 - Different type of delivery depending on Package Type (Customer Type): Student 3wks / Bulk 2wks
TK2301-0357 - Package Type: Price lists (Student: Modifies prices) Different discounts will be applied on order (Trigger)
TK2301-0358 - Ref number: Year0000, resets every year
TK2301-0363 - Quickbooks report
TK2301-0351 - Deliver Training session
TK2301-0359 - Shipping is a custom field on top, will not be managed as service, (Oregon)
TK2301-0361 - Parenting Orders Module
TK2301-0362 - 1 report
TK2301-0364 - Final preparation
TK2301-0365 - Monitoring
TK2301-0366 - Change Implementation stage to Complete and move it to Support





Prerequisites overview

- **Access**
 - VPN
 - FTP
 - Dolibarr and database credentials
 - Server details
- **Resources availability**
 - People
 - Production and Development instances)

Weekly reviews

- Every Tuesday, 10 am CST
- Zoom

<https://us06web.zoom.us/j/84846325672?pwd=OFNicFhsNjlyTIBnWU03ak1SSVV1Zz09>

Meeting ID: 848 4632 5672 Passcode: 418891



Non-working days

- President's Day, February 20

Communication channels

- Armando
 - aae@unboxerp.com
 - 7262048757 Ext: 111
- Aimee
 - agp@unboxerp.com
 - Chat: <https://unboxcrm.my3cx.us/callus/#aimeegarcinava>
- Support:
 - support@unboxerp.com
 - 7262048757 Option 2

Questions



&

Answers



Thanks

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