
Implementation Checklist

Pre-Installation Steps

✓ **Hardware Implementation**

- Windows 2000 (or newer), or Linux loaded on the server
- Computers that will be using Fishbowl networked
- A minimum of 300 MB available space on your HDD
- At least 1 GB of RAM for Server and 512 MB RAM for Client
- Set monitor resolution to at least 1024x768
- CD Rom if you will be installing from a disc
- Reliable Internet access
- Latest service packs and updates installed

✓ **QuickBooks Integration**

- QuickBooks version 2007 or newer
- QuickBooks client (application) on the same computer as the Fishbowl server
- Enable class tracking in QB if applicable (location group tracking in Fishbowl)
- Decide how frequently you will download information into QB
- Verify that all data in QuickBooks is accurate and make any needed changes
- Login to QuickBooks as "Admin" and switch to single user mode
- Print instructions for integration from Fishbowl's accounting configuration

Install Fishbowl Inventory Software

✓ **Installation**

- Insert disc or run download to install the latest version of Fishbowl Inventory
- Select "Quick Server" install on server "Quick Client" on all other workstations
- Create a new Fishbowl Database
- Start Fishbowl Server then Client. Use the client to login (user & pw = admin)

✓ **Company Set-up**

- Determine the number of workstations the Fishbowl client will be running on
- Determine how many people will have access to Fishbowl
- Configure users, security rights, and user access for Fishbowl modules
- Set appropriate payment terms for your customers
- Determine how many locations do you have and setup appropriate warehouses
- Determine the functionality of each needed location and configure appropriately
- Enable location group tracking if applicable (Class tracking in QuickBooks)
- Assign locations to proper location groups
- Determine if you will need a product tree (to apply pricing changes by category)
- Create classes as needed (Location, Enterprise or Type of Product)
- Determine if you will use serial numbers, expiration dates, or other tracking
- Determine if you need to create any custom fields
- Determine which units of measure (and conversions) you will need
- Restart Fishbowl server and Fishbowl client

Post-Installation Steps

- ✓ **Setup Inventory Locations & Units of Measures**
 - Complete initial setup wizard in Fishbowl and enter appropriate data
 - Setup needed location groups
 - Setup needed locations, delete any that are unused
 - Enter applicable units of measure
 - Enter unit of measure conversions as needed
 - Edit information on carriers that are applicable and add needed vendors
 - Enter new terms offered to customers and by vendors
 - Insert company Logo to be used on Fishbowl reports

- ✓ **Integrating with QuickBooks**
 - Setup or modify payment terms
 - Go to accounting module to perform the QuickBooks integration
 - Enable class tracking (optional) within QuickBooks if applicable
 - Bring in company information if applicable
 - Bring in inventory items if applicable
 - Bring in vendor (supplier) information if applicable
 - Bring in customer information if applicable
 - Set module options accounting module

- ✓ **Assign Individual Parts to Locations**
 - Assign individual parts to Locations
 - Move parts to their locations using the Inventory Transfer Data import
 - Make sure the spreadsheets are formatted correctly
 - Verify inventory quantities and make needed changes

- ✓ **Set up User Groups and User Rights**
 - Create New fishbowl user groups
 - Assign user group rights
 - Create new users and enter passwords
 - Assign users to user groups

- ✓ **Enter Tax Information**
 - Add tax Agencies
 - Add tax rate.
 - Assign the classes are you going use. (Location, Enterprise or Type of Product)

- ✓ **Create Bill of Materials**
 - Determine type(s) of BOM's that are needed
 - (Option 1) Manually enter bill of materials
 - (Option 2) Import bill of materials using Bill of Materials CSV file import
 - Set "Always Manufacture" option where applicable

✓ Purchasing Module Group

- Update vendor information
- Enter information on parts vendors sell to you
- Review module options in each module

✓ Refine the Materials Module Group

- Make sure all parts are entered into Fishbowl
- Use the Part, Product, and Vendor Pricing CSV file to update multiple parts
- Make sure all parts are properly classified under the "Details" tab
- Enter in any defined custom fields you might use
- Check any options that will be applicable for each part
- Enter in Receiving Tolerance, Cycle Count Tolerance, and Lead time for each part
- Associate each part with a vendor(s) who sells it
- Import pictures if you are going to use that feature on various parts and products
- Assign default locations for each part
- Review module options in each module

✓ Go to the Sales Module Group

- Create needed customer groups in the customer module
- Assign customers to groups under the groups tab
- Assign default sales reps to manage customer accounts
- Setup needed pricing rules on a customer, customer group, or product basis
- Setup any discounts that are used
- Review module options in each module

✓ Fishbowl Inventory Reports

- Go to the report module in the general module group
- Verify that reports information is accurate
- Contact fishbowl reports team for any report modifications or custom reports
- Review module options