

Owner Go-Live Checklist

Use this as the executive go-live checklist before the team starts running real customer work through the system.

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Owner Go-Live Checklist

This checklist is for the owner, president, GM, or senior operator responsible for taking a print company live in Excelsus IQ.

The point of this guide is not just to turn features on. The point is to make sure the shop can actually quote, convert, schedule, produce, invoice, and report inside one system without confusion.

What Go-Live Means

For this system, go-live means all new production work should be able to move through the following flow:

1. customer selected
2. quote built from catalog data
3. quote approved

4. order created
5. schedule generated
6. production clocked
7. purchasing and receiving handled if needed
8. invoice created
9. payment and reporting handled from the same record set

If any one of those steps is still being done outside the system for normal jobs, the shop is not fully live yet.

Owner Responsibilities

The owner should approve:

- pricing policy
- department structure
- job flow logic
- margin strategy
- tax and accounting defaults
- user access
- go-live date
- first-week escalation rules

The owner should not personally enter every record, but should sign off that the people responsible have completed the setup.

Role Ownership Before Go-Live

AREA	PRIMARY OWNER	SECONDARY OWNER
Company settings	Owner / Admin	GM
Tax and accounting defaults	Owner / Finance	Admin
Vendors and purchasing rules	Purchasing / Admin	Owner
Materials	Estimating / Production	Purchasing
Machines and speeds	Production Manager	Owner
Processes and departments	Production Manager	Estimating Lead
Prepress and rush rules	Estimating Lead	Owner
Customers and contacts	Sales / CSR	Admin
Operator skills and schedule settings	Production Manager	Owner
Reports and dashboards	Owner / Finance	Admin

Phase 1: System Readiness

Confirm each of these is complete.

Company

- company name is correct
- slug is correct
- timezone is correct
- logo and brand color are correct
- order, PO, and invoice prefixes are correct
- proof approval rule is intentionally set
- auto-generate schedule on order is intentionally set

Users And Access

- every active employee has a user record
- each user has the correct role
- managers have the right scheduling access
- report permissions are limited to people who need them
- operators who clock time exist as users
- actual labor rate per hour is filled in where actual labor costing matters

Accounting

- tax rates are loaded
- payment methods are configured
- late fee and grace period are configured
- fiscal year setting is correct
- default income and COGS accounts are set if used
- overhead settings are filled in with real monthly numbers

Phase 2: Catalog Readiness

This is the biggest source of go-live failure in print shops. If the catalog is weak, the quotes become weak immediately.

Vendors

- all primary media vendors are loaded
- all outsource vendors are loaded
- all hardware vendors are loaded
- vendor terms and contacts are entered

Materials

- top selling roll materials are loaded
- top selling sheet materials are loaded
- laminate materials are loaded
- rigid substrates are loaded if the shop prints rigid work
- each material has correct dimensions
- each material has correct current cost
- waste, bleed, gutter, and trim assumptions are reasonable

Machines

- primary printers are loaded
- primary cutters are loaded
- laminators are loaded
- mounting or finishing equipment is loaded where applicable
- pricing model matches how the shop actually prices
- speed unit matches the real work driver
- setup time is realistic
- machine cost calculator is filled in for major machines

Processes

- all recurring finishing steps are loaded
- outsourced steps are loaded with vendor and outsource cost
- schedule-relevant processes are marked correctly
- default machine type and department are assigned where applicable

Hardware

- recurring billable hardware is loaded
- cost per unit is current
- minimum quantity is reasonable

Phase 3: Production Readiness

Departments

- departments are set up for the real shop flow
- sort order matches actual production flow

Recommended examples:

- Printing
- Laminating
- Cutting
- Finishing
- Handwork
- Kitpacking
- Packing
- Shipping
- Installation

Shop Hours And Resource Availability

- shop hours match the real plant hours
- working days match the real week
- holiday closures are entered
- machine-specific overrides are entered where needed
- process-specific overrides are entered where needed

Operator Skills

- key operators are assigned to the machines they actually run
- primary operators are marked where the shop depends on them
- skill levels are not left generic if scheduling should respect skill

Job Flow Rules

- at least one default rule exists
- the rule uses department-first sequencing if that is the intended shop model
- one specialty rule exists if the shop has a common alternate flow

Process Sequences

- only recurring special flows are templated
- edge-case flows are not overbuilt before go-live

Phase 4: Estimating Readiness

Estimating Defaults

- default waste is realistic
- default quote validity is intentional
- default margin group is correct
- quote loading percent is intentional
- below-margin warning is on
- machine selection requirement is intentionally on or off

Prepress

- standard prepress exists
- file prep per version exists
- auto-apply is only enabled for charges that should happen on most items

Rush

- rush rules exist for the turnaround levels the shop actually sells
- percent and minimum values are both reviewed

Margin Groups

- standard margin exists
- premium margin exists if rush or specialty work needs it
- wholesale or trade margin exists if the shop sells to resellers

Phase 5: Customer Data Readiness

Customer Master Data

- top customers are loaded
- each active customer has billing data
- shipping data is complete where needed
- default sales rep is assigned
- default CSR is assigned
- default tax rate is assigned
- tax exempt status is correct
- quote loading, discount, commission, and margin defaults are reviewed

Contacts

- each top customer has at least one active contact
- one contact is marked as default
- email and phone are present where the team relies on them

This matters because quotes and orders inherit their header defaults from the customer.

Phase 6: End-To-End Testing

Do not go live before real test jobs have been run end to end.

Minimum Test Scenarios

Run at least these:

1. simple reprint job
2. multi-item quote
3. multi-version quote
4. rush quote
5. job with laminate
6. job with cutting and handwork
7. outsourced step or purchased component
8. taxable job
9. tax-exempt job
10. invoice and payment

For Each Test Job, Confirm

- customer loads correctly
- default contact appears
- sales rep and CSR inherit correctly
- item quantities and versions total correctly
- prepress applies correctly
- rush applies correctly
- machine and process costs calculate
- quote converts to order
- order schedules correctly
- operator can clock in
- actuals update
- PO can be linked if needed
- invoice totals are correct

Go-Live Approval Table

AREA	APPROVAL QUESTION
Pricing	Are we comfortable selling from these rates today?
Customers	Do quotes and orders inherit the right defaults?
Production	Will the default flow match how the floor really works?
Scheduling	Can the production manager trust the schedule output?
Actuals	Can operators clock in and produce usable labor data?
Accounting	Are tax, invoice, and payment defaults acceptable?

If the answer is **no** to any of those, delay go-live until the gap is closed.

Cutover Plan

Choose one cutover rule and stick to it.

Recommended Cutover

- existing open jobs stay in the old process if they are close to completion
- all new quotes from the cutover date forward are created in Excelsus IQ
- all approved new quotes become orders in Excelsus IQ

This is usually cleaner than trying to backfill every old job midstream.

Day-Before Go-Live Checklist

- team has been told the go-live date
- estimator guide has been reviewed
- production floor SOP has been reviewed
- one person is assigned as first-line support for sales and CSR
- one person is assigned as first-line support for production
- fallback contact is assigned for accounting and invoicing questions
- browser logins and sessions are working for all users

Day-1 Go-Live Checklist

Morning

- confirm all users can log in
- confirm manual pages are visible in Settings
- confirm one known customer opens correctly
- confirm one new quote can be built
- confirm one quote can be converted to an order
- confirm one order hits the schedule
- confirm one operator can clock into a task

Midday

- review first quotes created that day
- review first orders created that day
- verify no one is bypassing customer defaults manually
- verify schedule steps look correct

End Of Day

- review errors and confusion points
- correct catalog or settings issues immediately
- write down any training gaps

First Week Control Plan

During the first week, the owner or GM should review:

- all quotes over the shop's normal approval threshold
- all rush jobs
- all jobs with unusual finishing
- schedule exceptions
- unassigned or unscheduled tasks
- operator clocking compliance
- invoice totals on the first few jobs

The point is not to micromanage forever. The point is to catch setup defects while the job count is still manageable.

Metrics To Watch During First Month

Track at least:

- quotes created
- quote win rate
- orders scheduled on time
- unscheduled tasks near due date
- average rush use
- time-entry completion rate
- invoice turnaround time
- gross margin on completed jobs

Stop-Ship Conditions

Pause go-live or pause full rollout if any of these happen repeatedly:

- customer defaults are wrong on most quotes
- machine or material rates are obviously unreliable
- schedule is sequencing work incorrectly
- operators cannot reliably clock time
- invoices are calculating incorrectly
- staff are building jobs outside the intended workflow

Final Sign-Off

The owner should be able to answer **yes** to all of these:

1. Do we trust the quote enough to send it to a customer?
2. Do we trust the order enough to hand it to production?
3. Do we trust the schedule enough to run the floor from it?
4. Do we trust the actuals enough to learn from them?
5. Do we trust the invoice enough to bill from it?

If yes, the shop is live.

New Modules To Validate Before Full Rollout

The platform now includes several major areas that should be explicitly validated before the shop treats them as production-ready.

Dashboard And Production Meeting

Confirm the team can use:

- [/dashboard](#)
- [/orders/due-today](#)
- [/orders/due-tomorrow](#)
- [/orders/all](#)
- [/production-meeting](#)

Management should confirm the data is believable enough to run the daily meeting from these screens.

Also confirm those screens show both:

- order lifecycle status
- live production status

The team should be able to read a row quickly without asking:

- is the order generally in production?
- what process is it actually in right now?

Product Catalog

Confirm:

- the Production Library naming is understood
- repeatable products are templated correctly
- fixed unit price products calculate correctly
- customer-locked templates behave correctly
- quote and order launch from product templates works cleanly

Inventory And Requirements Planning

Confirm:

- on-hand balances are loaded
- reserved quantities change correctly
- PO receiving increases inventory
- material usage reduces inventory
- spoilage is being captured
- cycle counts work
- the team knows where the daily requirements report lives

Required report:

- [Inventory > Daily Requirements](#)
- route: [/inventory/requirements](#)

AI Features

Confirm:

- AI infrastructure is configured
- only intended AI features are enabled
- prompt templates are reviewed
- review queue ownership is assigned
- staff understand that AI output is advisory, not autonomous

Customer Portal

Confirm:

- visible statuses are configured
- file upload rules are configured
- reorder behavior is configured
- portal upload and reorder data is visible internally
- customer-facing milestone emails behave correctly

Staff Login And Permissions

Confirm:

- owner login works
- owner knows the organization workspace slug
- each real staff member has a named login
- dashboard, report, accounting, and admin permissions are assigned intentionally
- no shared office-wide credential is being used as the operating model

Module Navigation

Confirm:

- enabled modules appear correctly in the far-left workspace navigation
- staff know to launch modules from the left nav instead of settings shortcuts
- only modules intended for this account are turned on

Microsoft 365 Email Delivery

Confirm:

- Microsoft tenant ID is entered
- Microsoft client ID is entered
- Microsoft client secret is entered
- sender mailbox is entered
- from address is correct
- quote request recipients are correct
- a test email succeeds from [Settings > Notifications > Email Delivery](#)

Do not treat outbound mail as ready just because the values are filled in. Send the test email.

Business Data Import Center

If using bulk upload for initial data load, confirm:

- import templates were used, not ad hoc spreadsheets
- customers and contacts are loaded first
- quotes, orders, and invoices are loaded in order
- imported counts match the source system closely enough
- a human spot-checked several imported customers, orders, and invoices

Report Builder

Confirm:

- report-builder permission is limited to the right users
- the owner or reporting lead understands how to choose a report base and fields
- saved operational reports use the intended runtime prompts such as date range, customer, and PO number
- at least one real saved report has been tested end to end

Quote Intelligence And Dashboards

Confirm:

- the leadership team understands quote intelligence is advisory only
- quote outcomes are being captured as won, lost, expired, or no decision
- loss reasons are being recorded on lost work
- the team understands the difference between quote intelligence and similar completed-job costing
- at least one manager knows how to read win rate by estimator, customer, product type, margin band, and amount band
- at least one scheduling lead understands the promise-date accuracy dashboard and how override behavior affects customer commitments
- vendor scorecards are assigned to a real owner if purchasing is active

NCR And Quality Controls

Confirm:

- NCR schema is applied
- NCR screens load
- NCR create path works from an order or item
- generated and uploaded NCR PDFs are stored correctly
- quality ownership is assigned

Process-Linked Production Statuses

Confirm:

- [Settings > Production > Process Statuses](#) is configured
- production status labels make sense for real processes
- the production meeting and due-order screens show both order and production statuses
- production staff understand that process status drives the floor view while order status remains the job rollup

Wegmans Small Format

If the Wegmans Small Format module is enabled, confirm:

- the Wegmans schema is applied
- order entry, tracking, order status, and press file screens load
- staff know the module is now accessed from the MIS left nav
- the team is not depending on historical job migration before the MIS workflow is validated

Accounting Sync

Confirm:

- QuickBooks or Xero is only enabled after sandbox testing
- source-of-truth settings are agreed
- sync logs are reviewed
- reconciliation and conflict workflows are assigned to a real owner

Local Test Database

Supabase being current is not enough.

The local `TEST_DATABASE_URL` database used by integration tests also needs to be current. Until that is true, automated regression coverage will continue to skip important end-to-end tests.