Baby steps

Getting Started · https://mountainstream.co/docs/getting-started-with-streamline/

[A web app interface with tabs for production, distribution, finance, and more. Arrows and purple boxes streamline menu options and shortcuts, highlighting how to switch modes and pointing out the current active page.]

Welcome to **Streamline,** a comprehensive ERP that probably has more features than you need.

This Getting Started section is designed for new clients to learn the ropes.

As part of our service, we set up your data and configure your reports. We hand walk you while you learn the system and give you unlimited support by Zoom and email. We may also visit you on-site if desired.

We recommend that you run Streamline in synch with your legacy system for at least a week, to ensure that everything has been configured correctly. During this time you will also learn to navigate the new system and get accustomed to the new reports.

Once we reach the milestone of switching off the legacy, we go live. You are now in a position to invite your customers to help themselves to ordering. This is the easiest part of the process and when you will see a massive difference in your operation.

Time now to focus on restructuring the business and reaping the benefits of the extra time and resources available.

We recommend that you create a ‘Login’ or ‘Wholesale’ link from your website to Streamline. It will be easier for your customers and team to find it.

The software is designed logically and intuitively; to add a new item go to the **Item Catalogue** and click “**Add**“, likewise, a new customer, go to the Customer List and so on. If you need a production report, look under **Production**.

It pays to spend 5 minutes opening the navigation menu and reading it – you will see the program at a glance and understand the logic.

Streamline works best in Google Chrome.

Get Started