The Setup Process

Getting Started · https://mountainstream.co/docs/the-setup-process/

Phase 1: Discovery & Information Gathering

This initial phase is all about understanding your operation. We'll ask you to provide the foundational data that we will use to build your Streamline environment.

What we'll need from you:

- **Your Product & Price List:** A list of the products you sell.
- **Your Operations Spreadsheet:** The spreadsheet you currently use to manage your operations.
- **Your Raw Materials & Recipes:** A list of all your ingredients and the recipes you use to make your products.

Simultaneously, we'll send you a **brief questionnaire** to capture the unique details of your business so we can configure the system to match.

Phase 2: System Configuration & Build-Out

Once we have your information, our team gets to work building your custom Streamline setup.

What we will do:

- **Build Your Recipes:** We will enter your raw materials and recipes into the system.
- **Import Your Customers:** We will extract your customer list, contacts, and addresses from your QuickBooks account.
- **Configure Your Settings:** We will set up customer-specific details like delivery charges and delivery days.
- **A Little Homework:** We will then give you a few small tasks to complete, such as reviewing the imported data, to ensure everything is perfect before moving on.

Phase 3: Training & Parallel Run

This is the hands-on phase where you'll get comfortable using Streamline with our full support.

- **Entering Orders:** You will begin entering your daily orders into Streamline.
- **Running in Parallel:** For a short period, you will run Streamline alongside your old system. This allows us to compare the data and confirm that everything has been configured correctly.
- **Building Your Reports:** We will work with you one-on-one to build custom reports, tailoring them to your exact needs and preferences.
- **Unlimited Support:** During this entire process, we will **hand-walk you through everything**. We offer unlimited support time via Zoom and email to answer any questions you have.

Phase 4: Going Live & Final Integration

Once you are fully confident with the system and the data is verified, we will complete the final steps to make Streamline your primary operational tool.

- **Invite Your Customers:** You can send invitations directly from Streamline for your customers to begin placing orders online.
- **Activate QuickBooks Integration:** We will turn on the automated exporting of invoices to QuickBooks and set up the opening balances for your customers.
- **Enable Live Inventory Tracking:** We will set up your opening inventory levels and begin live tracking as new orders are placed and products are made.

Get Started