

# Checklist: Running a Package Club



Club name: \_\_\_\_\_

Release date: \_\_\_\_\_

Begin going through the following checklist two weeks *before the release date*:



**Assign web user IDs**

(CUSTOMER list : Actions : Assign Web Identity)



**Send the membership data e-mail**

(CUSTOMER list : Actions : Send to Customer : Email Membership Data)



**Validate member addresses**

(CUSTOMER list : Actions : Address Validation)



**Update sales tax codes**

(CUSTOMER list : Actions : Assign Sales Tax Code)



**Add inventory items**

(INVENTORY list : new record)



**Create the club package**

(PACKAGE list )



**Create transactions**

(CUSTOMER list : Actions : Create Transaction : Sales Order from Package)



**Check transactions for errors**

(TRANSACTION list : View : Order Detail, Shipping Detail)



**Confirm inventory and supplies**

(TRANSACTION list : View : Order Summary, Packaging)



**Test label printer**

(Printer is working and sufficient label stock is on hand)



**Check the weather forecast**

(TRANSACTION list : View : Shipping temperature)

On *the release date*:

- Charge members' credit cards**  
(TRANSACTION list : Actions : Credit Card : Sale)
- Print shipping labels**  
(TRANSACTION list : Actions : Shipping : Create Labels)
- Send receipts and gift memos**  
(TRANSACTION list : Actions : Sales/Credit Receipt : Email)

Approved: \_\_\_\_\_