

# Admin Setup and Go-Live Guide

Setup | Owners and managers

Set FlintPOS up in the right order so pricing, taxes, users, registers, delivery, payments, printing, customer display, email, and backups work cleanly before the first live sale.

## What This Guide Helps You Do

- Configure the store in a sequence that prevents day-one surprises.
- Identify the settings that change pricing, tax, dispatch, and payment behavior.
- Use a repeatable go-live checklist instead of figuring it out at the counter.

## START WITH STORE IDENTITY AND COMPLIANCE RULES

Open Settings and finish the store profile before you touch users, processors, or training. Business name, address, phone, company email, logo, receipt wording, and card-pricing disclosures flow into receipts, order slips, portal pages, emails, and the customer display.

1

### Fill in the store record once

Enter the business name, address, phone, company email, and any receipt-facing text exactly how customers should see it.

2

### Set the pricing and compliance defaults on purpose

If the store uses cash discount or card-fee pricing, set it here and verify staff knows which price the customer should see before payment.

3

### Upload the logo before testing anything customer-facing

The same image can appear on receipts, order slips, and the customer display, so fix it now instead of chasing branding mismatches later.

## BUILD THE MONEY RULES BEFORE YOU TRAIN STAFF

Two settings families change live totals more than anything else: pricing and tax. Staff should know that customer type, pricing tier, discount, product taxability, and tax basis are not bookkeeping trivia. They are what make the total move.

- Retail, contractor, and wholesale customers can land on different pricing paths because the customer record and product pricing tiers are used together at checkout.



- Discount percent, credit limit, net terms, and tax-exempt or resale flags also come from the customer record, so test those on sample accounts before live sales.
- Product taxability and stacked jurisdiction tax rates drive sales-tax collection. If a taxable product, customer exemption, or delivery address changes, the cart total can change too.
- Set tax reporting basis to accrual or cash based on how the business files. That choice changes what the tax reports mean later.

**Cross-check**

Use the pricing, tax, customer, and inventory guides together here. Those settings are split across screens, but they meet in the cart.

## SET UP USERS AND ROLE ACCESS BEFORE PEOPLE SHARE DEVICES

FlintPOS user management lives in Settings > Users. Admins can create, edit, reset, deactivate, and delete users. Managers can review the user list, but the destructive moves stay admin-controlled.

- 1 Create one login per person**  
Add the employee name, username, password, role, and optional email. FlintPOS surfaces the company email, username, and password together because staff need all three to sign in.
- 2 Match the role to the real job**  
Admins and managers reach Settings. Salespeople stay on POS, customers, and orders. Drivers should use the driver workflow.
- 3 Reset or deactivate before you delete**  
Leave the password blank if nothing should change. Deactivate first if you are not fully sure the account should be gone.

**Access warning**

Deleting a user is permanent and immediately blocks login.

## FINISH REGISTERS, PROCESSORS, AND THE CUSTOMER DISPLAY AS ONE COUNTER SYSTEM

Do not treat registers, processors, receipt printers, and the customer display as separate projects. They are one checkout chain. If one link is wrong, the whole counter feels broken.

**1****Choose the active processor and test the connection card**

In the terminal and processor settings, pick the store's processor and verify that the status card shows a working connection before practice sales start.

**2****Claim the register on the physical device that will use it**

Registers and customer display pairing depend on workstation identity. Duplicate or vague workstation names create pairing mistakes fast.

**3****Pair the customer display from the register-specific QR code or URL**

Settings generates a QR code and URL tied to that workstation. Scan it on the customer-facing screen so the display follows the right register over the local network.

**4****Print a receipt and an order slip before go-live**

Receipt output, slip output, cash drawer behavior, and the payment result should all be proven in one test transaction.

**Go-live rule**

A processor connection without a successful practice sale is not done.

## **SET UP DELIVERY RESOURCES, INTEGRATIONS, AND COMMUNICATION WITH REAL DATA**

The rest of Settings should mirror the way the business already operates. Trucks, SMS, WooCommerce, QuickBooks, email, and scale settings only help when the real-world account data is correct.

- Build trucks with real names, capacities, stops, and compartments if you dispatch bulk or multi-stop work.
- Use Twilio or RingCentral settings to send a test text from the number customers will see.
- Choose the WooCommerce source of truth before you sync. POS-led and WooCommerce-led setups behave differently and should not be mixed casually.
- Connect QuickBooks, then map income, receivables, and deposit accounts before you trust the sync.
- Enable the scale only on the desktop app, choose the COM port and baud rate, and run the live weight test on the actual counter machine.

## PROTECT THE STORE BEFORE YOU NEED RECOVERY

Backups, reminder jobs, and support-session behavior matter most on a bad day. Verify them while the store is calm.

- Review backup settings, confirm whether automatic backup is enabled, and run a manual backup once so the file path and cloud upload are proven.
- Review the restore warnings before anyone starts recovery. Keep restore access with a manager or admin who has a rollback plan.
- Review automation and reminder settings so statements, reminder emails, or other scheduled jobs do not surprise the team.
- Read the support-session banner behavior now so staff knows what it means if FlintPOS support joins a session later.

## USE A REAL GO-LIVE REHEARSAL

The cleanest launch is a short rehearsal that looks like a small real day. Ring one taxable retail pickup, one contractor or wholesale account sale, and one delivery order so pricing, tax, payment, dispatch, and reporting all get exercised together.

- Create one sample retail customer and one contractor or wholesale customer before rehearsal starts.
- Check the POS cart, orders queue, delivery board, and reports immediately after the practice transactions.
- Train staff on the exact flows they will use on day one instead of touring every tab in Settings.

### Keep Going

Use the FlintPOS Docs hub to search for related guides by role, category, or job to be done. Open the interactive walkthrough at </quickstart/settings.html> when you want a screen-by-screen visual refresher.