

Transitioning your team to commonsku

Note: Some teams go live before the 4-week mark — and that's encouraged! As soon as your Admin setup is complete, you can start using commonsku with real orders. **The 4-week timeline is a guide, not a requirement.**

Week 1

✓ Set your “Go Live” target for Week 4

- This is the date the entire team moves to commonsku for all new orders
- You can go live earlier if Admin setup is complete and your team is ready to start testing with real orders

✓ Identify a “commonsku Champion”

- The person (or people) who will manage the transition
- Should be open to change and willing to learn the platform inside and out

✓ Book team commonsku training for Weeks 2 & 3

- Training sessions are role-based (sales, production, finance, etc.)
- Company-wide Working Sessions will be scheduled for the full team — see **Week 3** for details

✓ Connect with commonsku's Avalara rep (*if applicable — Advanced plan only*)

- If you have an existing account, they'll help connect it to commonsku
- If you don't have an account, they'll set one up if applicable

✓ Extract clients from your current CRM

✓ **Format clients using the commonsku client import template**

- Importing contacts is optional — you can import companies only
- Assign a sales rep to each client; if multiple reps handle one client, decide whether to split or consolidate in commonsku

✓ **Activate your commonsku account**

- Give access to your Champion and admins

✓ **Attend an Admin training session (1 hour)**

- Covers order handoffs, Settings, and Permissions

✓ **Complete after Admin training:**

- Company Settings and Permissions
- Client Statuses
- Commissions (***Advanced plans only***)

Week 2

✓ **Complete supplier setup in commonsku**

- Create accounts with key suppliers and add main contacts
- Add Decorators and Decorator matrices

✓ **Identify training framework and expectations**

- Determine what, if any, homework you want staff to complete before going live

✓ **Complete commonsku training for the entire team**

Training format varies by plan:

- **Advanced:** Role-based sessions (sales, production, finance) — approximately 1 hour per department. Larger departments can be split across multiple sessions.

- **Essentials:** Webinar-based training broken into 30-minute sessions (5–6 sessions total). Depending on the role, team members may attend 1–2 sessions (e.g., sales may need 2 sessions; finance may only need 1).

✓ Have your Champion run follow-up sessions per department

- Use these as refreshers or to gather questions ahead of Working Sessions

✓ Receive your commonsku Standard Operating Procedures (SOP) guide
(Advanced plan only)

Week 3

✓ Complete Working Sessions for the entire team

- Working Sessions are company-wide, not department-specific
- Sessions are 1 hour and can be split across multiple bookings for larger teams

✓ Prepare the team for launch the following week

Week 4

✓ Go live in commonsku

- All new presentations, estimates, and sales orders begin in commonsku
- Your team may already be using commonsku at this point — Week 4 is when the full team transitions exclusively to commonsku

Post Go-Live

✓ Export open orders from your legacy system to Excel for tracking

✓ If you changed accounting systems:

- Prioritize paying outstanding supplier invoices from the legacy system
- Journal entry open balances for suppliers into your new accounting system

✓ Re-create any open orders in commonsku

Final notes

- If moving from a legacy system, check what order history your system can export to minimize manual work. Manual exports typically take a full-time person approximately 2 weeks (often temp or outsourced).
 - Export sales orders, purchase orders, and invoices into shared folders for reference.
 - Orders from Weeks 1–4 continue in your old system; the commonsku Go Live date is the cutoff.
 - There will be some rekeying for open jobs.
 - **Keys to successful adoption:** designate an internal Champion as the go-to resource, and set up internal shadowing or peer sessions.
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commonsku Terminology

Project

- Anytime you need to create a new order in commonsku, you'll always start by creating a project. Projects are like a file folder; they store all sales forms (see definitions below) and all information about your opportunity or order in one accessible location.

- In a Project, you can:
 - Create sales forms such as presentations, estimates, and sales orders
 - Create client invoices
 - Log supplier bills
 - Calculate commissions
 - Forward emails to the project's overview
 - Add/upload important notes, files, or documents relevant to the job
 - Close/cancel a project
 - Delete a project or form

Presentation

- Presentations help sales reps showcase product ideas to their clients. To put it simply, you use them to "present" product options. They provide pricing by quantity, and can be sent to your client as a live document. Presentations are **NOT** a mandatory step in the project, but are very useful and have the most design flexibility.
- With presentations, you can:
 - Source products from various databases, including ESP and SAGE
 - Add artwork details and charges to each item
 - Choose from a range of presentation styles for formats
 - Use comments to get feedback from your client on products

Estimate

- Estimates (commonly referred to as quotes) help sales reps provide detailed quotes for their client. By using unique features like hiding products and hiding totals, sales reps can create multiple quotes from a single common estimate. Estimates provide more specific, full quantity pricing and display artwork details to the client. Estimates are NOT a mandatory step in the project.
- With estimates, you can:
 - Source products from various databases, including ESP and SAGE
 - Add discounts and credits
 - Include international costs (i.e., duty)
 - Add service charges
 - Hide products

- Hide totals
- Copy items to show a variety of product options (i.e., different sizes, colors, or types of artwork that can be applied to a single item)

Sales Order

- Sales orders allow sales reps to confirm order details with their client, such as the products and services they'd like to purchase, including each item's pricing and artwork information. The sales order is where your client will provide final approval before their order goes into production. Sales orders **are a mandatory** part of the project - they are required for creating purchase orders for suppliers, and for creating a final invoice for the client.
- With sales orders, you can:
 - Source products from various databases, including ESP and SAGE
 - Add discounts and credits
 - Include international costs (i.e., duty)
 - Add service charges
- You can create:
 - A normal sales order
 - Self-promo orders
 - Reorders
 - Orders for overrun samples (samples for your office)
 - Sample orders (samples for the client)

Purchase Order

- Purchase orders list each product/sku or service's name, net cost(s), and artwork details and provide shipping information to your suppliers.
- You can submit a PO by:
 - Emailing it to the supplier
 - Sending an ePO (electronic purchase order) directly to the supplier's database for our Connected+ suppliers
 - Capturing other methods, such as sending through the supplier's website

Invoice

- Invoices are used to request payment from your client. You can create deposit invoices, request full payment upfront, or invoice once an order is complete.
- With invoices, you can:
 - Add discounts and credits
 - Enter service charges
 - Accept credit card payment or ACH (US Distributors)

Bill

- Supplier bills show the amount owed for an order's goods and services. You can add/vouch your supplier bills to commonsku against the Purchase Order, calculate the Billed Margin and your sales rep's commissions.
- You can create:
 - One bill for one PO
 - Multiple bills for one PO
 - One bill for multiple POs
 - One bill against an entire project (no purchase order required)

Client rep

- The client rep is the member of your team who owns the relationship with a particular client. Sometimes referred to as the Account Executive, Account Manager, or lead Sales rep. The best practice is to assign the client rep directly on the client's page/profile, so it defaults on each project, but you can also select the client rep on a per-project basis for commission purposes. The client rep and order rep may be the same person.

Order rep

- The order rep is responsible for creating and inputting information into the project's client-facing forms and is usually called the account coordinator or junior account rep. The order rep automatically defaults to whoever created the project; from there, it can be re-assigned on a per-project basis. The client rep and order rep may be the same person.

Production rep

- The production rep is responsible for managing purchase orders and communicating with suppliers. A team admin can assign your default production rep through their company settings.

In-hands date

- A date set for each project, and for each PO created for a supplier. This is the date the items from your project need to be in the client's hands. Many of commonsku's key reporting and projection tools rely on the in-hands date, so it's important that it is kept accurate and up to date as the project progresses.

Custom product

- A product created by a member of your team that lives in your company database. Users will create custom products for:
 - Items that are not listed in any of commonsku's integrated product databases (SAGE, ESP)
 - Items manufactured in-house
 - Shipping charges that will need a separate PO for billing purposes (UPS, FedEx, etc).
 - Other services for which a separate PO or bill is needed

Client

- A customer account. Clients are represented by their company name.

Contact

- Contacts represent the people you interact with while creating a project for the client. You can have as many contacts per client profile as you need.

Supplier

- The vendors you build purchase orders for and order products from.
- commonsku integrated suppliers are listed in three different categories:

- **Connected+** refers to suppliers that have added full PromoStandards integrations - your Connected+ suppliers offer Electronic Purchase Orders for faster order submission and processing!
- **Connected** refers to suppliers that have basic PromoStandards integrations - this includes features such as live inventory, as well as order status, and shipping notifications.
- **Community** refers to suppliers with no PromoStandards integrations.

Promostandards

- PromoStandards is a data-sharing agreement between commonsku distributors and suppliers designed to streamline communication between you and your vendors. It helps suppliers connect their product databases to commonsku to share inventory, shipment details, and pricing.
- Suppliers that are active inside commonsku can offer up to four PromoStandards endpoints:
 - [Inventory](#)
 - [Order Status](#)
 - [Order Shipment Notifications](#)
 - [Electronic Purchase Orders \(ePOs\)](#)

Booked margin

- The Booked Margin is the margin you "booked" when you made the sale; it's based on the cost and selling price of each item on the sales order.
- The Booked Margin may include or exclude services depending on how your team has set up margin calculations and if the line was intentionally included or excluded in the margin calculation.

Billed margin

- The Billed Margin is the actual profit on the order; it's based on the cost of supplier bills and the selling price from each item on the invoice.

- The Billed Margin may include or exclude services depending on how your team has set up margin calculations and if the line was intentionally included or excluded in the margin calculation.

Shops

- commonsku's e-commerce tool. Live storefronts that can be built for the public, or for a particular client. Shops are fully integrated with commonsku's order management system and incur a 2.5% transaction fee for each order. There are three different types of commonsku shops:
 - Marketing Shops
 - Company Shops
 - Pop-up Shops