

1. Confirm Business Essentials

Verify tax, business identity, time zone, policies, and payment methods before taking live transactions.

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First-Day Setup Checklist

- Verify the location name, address, logo, time zone, and currency.
- Confirm every required sales-tax rate and product tax assignment.
- Review customer-facing policies and receipt wording.
- Confirm accepted payment methods.
- Select and test the card processor, if integrated.
- Create employee roles and employees in Back Office.
- Configure the register, shifts, and cash drawer.
- Set the daily target.
- Test printers, payment devices, and displays.

Complete configuration before processing live customer transactions.

How to Verify Sales Tax Before Your First Sale

Sales tax is one of the first settings to review because it affects transaction totals and reporting.

1. Open **Settings**.
2. Review the configured tax rates and tax templates.
3. Confirm taxable products are connected to the correct tax behavior.
4. Review any payment-method rule that forces tax for supported card methods.
5. Run a safe test sale and verify subtotal, tax, and total.

See [Payments, Taxes & Pricing](#).

How to Verify Business Information, Time Zone, and Policies

1. Open Settings → General.
2. Confirm business name, address, contact information, logo, currency, calendar, and time zone.
3. Review the general policy that may appear even when no specific item policy applies.
4. Review receipt and workflow-specific policies.
5. Save and test a receipt.

The correct time zone is essential for shifts, day end, reports, and scheduled alerts. See [General Business Settings](#).

How to Review Payment Methods Before Launch

1. Confirm the methods your store accepts are visible.
2. Hide methods employees should not use.
3. Set signature, address, last-four, and forced-tax requirements.
4. Enable and select the integrated processor.
5. Protect integration bypass with a PIN.
6. Test each accepted payment workflow safely.

See [Payment Methods & Checkout Controls](#).