

# docketmanager

## Going Live MIS Checklist

Use this checklist to confirm you are ready to 'Go Live!'.

### General Setup

#### Settings > Accounting

##### Financial

- Banking - Has all banking information been input?
- Configuration - Has the system been configured to your specifications and best practices?

##### Order Start Number

- Order Start Number should not be modified until the day you 'Go Live' in order not to confuse test orders with live orders
- If importing Old Order History and open AR, the order start number will need to be higher than your last order invoice number being imported

- Deposit Types - Remove any deposit types you do not want as selectable and add any missing ones.
- Payment Types - Remove any payment terms you do not want as selectable and add any missing ones.
- Payment Terms - Remove any payment terms you do not want as selectable and add/edit any missing ones.
- Taxes - Have all selectable tax types been added with their respective rates?

##### Previous AR

- Manual Entry - Will you be manually entering any outstanding invoices with balances from your previous MIS in order to accept payments on those invoices as of your 'Go Live' Date in Docketmanager? - See Note above
- Import Previous AR - consult your DM Support Specialists for file formatting if wanting to import outstanding invoices as of your 'Go Live' Date.

# docketmanager

## Going Live MIS Checklist

### Best Practice

- Complete as many payments in previous system on outstanding invoices and if choosing to import previous AR, you should have the file sent within 1-3 days following 'Go Live' Date

### GL Accounts

- All GL Names/Account Numbers added to the system.
- Set GL Accounts - All GL Accounts have been assigned to the various assets, liabilities, Discount Expense and Revenue areas.

### Settings > Admin

#### Account

- Customers - Has your company information been completed?
- Contacts - Have your employees been added as contacts?
- Have employees that are users have selectable set to 'Yes' in order to be assigned or selectable in the system?

#### Active Users

- You will be automatically billed an additional monthly fee per user for any active user(s) added above your DocketManager Agreement.

### Configuration

- Time Zone - Has the appropriate time zone been selected?
- Date Format - Has a date format been chosen?
- Language - Has the appropriate language been selected?
- Measurement Units - Have you selected the appropriate measurement units?

# docketmanager

## Going Live MIS Checklist

### Integrations *\*Not Mandatory\**

- Merchant Gateway - If wanting to accept credit card payments in DocketManager, have you setup and tested your Authorize.net account.
- Outgoing Mail (SMTP Server) - If you want all outgoing mail sent within DocketManager routed through your server, have you completed the Integration
- Remote Connections - If integrating with Hot Folders, has the setup been completed and tested.
- Shipping - If integrating with Shippo, have you replaced your 'Test' Auth Token with your live Auth Token?

### Security

- Have Security Roles been customized and setup for all employees?

### Settings > Communications

#### Documents

- Have you reviewed all documents, set defaults for each group, inactivated those you don't want selectable to your employees?

#### Best Practice

- Always, duplicate a document then make changes if you choose to edit, then you always have the original to fall back on.
- Always, 'Inactivate' documents you don't want as selectable as you can easily re-activate if you choose later whereas, when you [Delete] you will need to start from scratch

#### Canned Emails

- Have you reviewed, modified/created and set defaults for your canned emails?

### Settings > Customers

#### Defaults

- Have you created/completed a MIS Customer Default

#### Locations

- Region - Have the appropriate provinces/states been added?

# docketmanager

## Going Live MIS Checklist

- Country - Have the appropriate countries been added?

### Tags

- Has the existing customer tag list been reviewed and edited?

### Settings > Dockets

### Cutting

- Setup - Have you entered any setup and/or minimum cut prices that are to be applied to quotes and orders.
- Cut Scales - Do you have a cut scale that will reduce the cut price set on the stock as the number of total cuts increases?

### Department Items

- Have Department Items been reviewed and those not applicable been removed?
- Have the Department Items been price tested by adding to test quotes/orders ensuring Lock To's are set where applicable and calculating appropriately to meet the needs of your shop?

### General

- Defaults - Have you set defaults that will be used when creating quotes/orders?
- Template, Department Item, Press Groups - Have you added groups to aid in filtering when applying Job Templates, Department Items or Presses to quotes/orders.

#### Best Practice

- Do not [Delete] a group until all items within the group have been re-assigned

- Note Labels - Have you customized and/or created [New] Note Labels that will be available for selection by your users when adding notes to customers, quotes and orders?

### Job Templates

- Have you modified, added and edited Job Templates that you will want to use for quote/order creation?

# docketmanager

## Going Live MIS Checklist

- Have you inactivated Job Templates that are not applicable to your business in order to eliminate confusion and increase the speed of selection for your users?

### Order Options

#### Order Options

- These create selectable drop-downs in your quotes and orders. When hovering over any name in the list, if a pencil icon displays you can click and edit the name or delete a name from the list by checking the box in front of the Name and [Delete]

- Item Type - Add/edit Item Types you want selectable, delete any you don't want.
- File Group - Add/edit the File Group Names that you want selectable, delete any you don't want.
- Unit of Measure - Review and add/edit those you want selectable, delete any you don't want.
- Order Due Options - Did you customize your selectable options and set a default?
- Invoice Delivery - Did you customize your selectable options for how you want to deliver invoices for orders?
- Shipping - Have you set your default units and boxes that will be available for selection when using the shipping module.
- Shipping Type - Have you added and customized your selectable shipping types and removed any you don't want?
- Statuses - Did you customize your selectable statuses that can be applied to quotes/orders?

### Press

- Are all applicable presses to your business setup, reviewed and confirmed as complete?
- Have all presses been price tested by adding to test quotes/orders ensuring they are calculating appropriately to meet the needs of your shop?

### Production

- Queues - Have you created, modified and placed in order all production queue tabs that you want to use?

# docketmanager

## Going Live MIS Checklist

- Workflow - Have new orders and posted orders been assigned in the workflow?
- Have you selected a Queue Priority, order items with specified status will appear always at the top of the queue.

### Stock

- Is your default stock cut cost and cut price correct?
- Have all your stock options and pricing been imported?
- Stock Tags - Has stock tags been reviewed, edited, customized?

### Tags

- Have you reviewed, customized or added selectable tags that can be applied to quotes, quote items, orders, order items and products?

### Timers

- Rates - Have all timer rates been configured accurately?

### Vendors/Suppliers

- Have all applicable vendors been added to the system?
- Have all applicable suppliers been added to the system?

## Additional Items to check prior to 'Go Live'

### Inventory Tracking

- Are you going to be tracking Inventory?
- If yes, have you created and received PO's for your stock on hand in order to begin the tracking process

#### Inventory Tracking set to 'Yes'

- The system will not allow you to post an order if there is no stock quantity on hand.
- You cannot adjust Inventory stock levels until you have created and received a PO for the stock.

# docketmanager

## Going Live MIS Checklist

### Test Quotes

- Do you want to or have you deleted your test quotes?

### Test Orders

- Do you want your Test Orders deleted from the system?

#### Best Practice

- Request your Test Orders to be removed from your DocketManager Site by submitting a Ticket through the issue button on your DocketManager site with the Order # Range you want deleted.

## Going Live

We understand that going live with a new system can be intimidating and we want the switch to be as smooth as possible. Therefore, included in our system setup is providing your team with a Support Representative for 2 - 1 hour booked sessions for the first 2 days that your Company goes live. A Support Representative will be available 9-5 EST to assist with one-off questions or concerns regarding going live during your scheduled period.

#### Best Practice

- Submit a ticket to our Support Desk through your 'Issue' button on your DocketManager Site.
- Include in your subject line 'Going Live'
- Include your actual 'Go Live' Date in the ticket and once received you will receive a link to book your 1 hour session with a Support Specialist for your first 2 days of 'Going Live'

- Go Live Date Scheduled
- 1st Day Support Session booked
- 2nd Day Support Session booked