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The Management System By Printers For Printers

ACCELERATED ONBOARDING CHECKLIST

PHASE 2 & 3

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Welcome to Phase 2 & 3 of the Accelerated Onboarding Process! This checklist has been designed to assist all new users through these phases by providing a checklist of what to expect to learn in each session, which individual tasks need to be completed post-session, and which employee webinars need to be attended in order to ensure your success with the onboarding process.

We recommend referring to this checklist for each session you'll be attending during these 2 phases of the onboarding process. Once phase 2 & 3 have been completed, we will be providing you with a checklist for Phase 4, as well as our Going Live checklist to ensure you and your team remain confident with the setup process.

Good Luck & Have Fun!

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Phase 2
Session #1: Group Tasks

- **Quote Review:** Learn how to create a Quote from Quick Add.

- **Stock Setup**: Learn how to create a Stock and understand Stock Settings.

- **Department Items**: Create a Department Item and understand Department Item Settings.

Session #1: Individual Tasks

- **Quote Review**: Practice the process of creating a generic quote in the system.

- **Stock Setup**: Practice creating a new stock in the system.

- **Department Items**: Practice creating a new department item in the system.

- **Questions**: Log all questions to be addressed during the next session.

Phase 2
Session #2: Group Tasks

- **Question Review:** Review questions from previous session.

- **Cutting**: Learn how to set up cutting & cut scales.

- **Presses**: Create a Press and understand Press Settings.

Session #2: Individual Tasks

- **Create a Quote**: Build your first quote using your department item, stock, and press.

- **Press Review**: Review all steps taken to set up a press in the system.

- **Cutting Review**: Review cutting setup process & ensure this process is understood.

- **Questions**: Log all questions to be addressed during the next session.

Phase 2
Session #3: **Group Tasks**

- **Question Review:** Review questions from previous session.

- **Job Templates**: Review all active Job Templates & inactivate all unwanted Job Templates.

- **General Settings**: Review General Settings such as Defaults, Template/Department Item/Press Groups and Note Labels.

- **Outsource Types:** Set Outsource Types.

- **GL Accounts:** Create GL's and assign all GL's accordingly.

Session #3: **Individual Tasks**

- **General Settings**: Ensure all General Settings have been set up.

- **Outsource Types**: Ensure all Outsource Types have been set and this process is understood.

- **GL Accounts**: Ensure all GL Accounts have been created and assigned.

- **Questions**: Log all questions to be addressed during the next session.

Phase 2
Session #4: **Group Tasks**

- **Create a Quote:** Create a quote from Quick Add.

- **Convert to Order**: Convert the Quote to an Order.

- **Production**: Follow the Order through the production queues.

- **Post**: Learn how to Post an Order & how posting functions in DM.

- **Invoice**: Learn how to Invoice an Order in DM.

- **Accounts Receivable**: Learn how to manage invoices in AR.

Session #4: **Individual Tasks**

- **Convert to Order**: Practice converting Quotes to Orders.

- **Production Review**: Review the production queues & practice moving jobs.

- **Posting & Invoicing**: Practice posting jobs and generating invoices.

- **AR Review**: Practice managing invoices in AR.

- **Questions**: Log all questions to be addressed during the next session.

Phase 2
Session #5: Group Tasks

☐ **Question Review:** Review questions from previous session.

☐ **Imports**: Discuss import templates for stock, contacts & customers.

☐ **Employee Webinars**: Introduction to Employee Webinar sessions and what to expect.

☐ **Session 1-4 Review**: Review all components of previous meetings to ensure all users feel confident with their progress in the accelerated onboarding.

Session #5: Individual Tasks

☐ **Employee Webinars**: Select a key employee to attend all webinar sessions listed to the right of this document.

More than one employee can attend any and all of the sessions, however, we strongly recommend selecting a key employee who will become your workplace DocketManager trainer.

☐ **Stock**: Prepare import sheets for phase 4 of accelerated onboarding.

☐ **Imports**: Prepare import sheets for phase 4 of accelerated onboarding.

☐ **Remaining Tasks**: Ensure all previous tasks and any additional tasks assigned by your onboarding specialist have been addressed.

Phase 3
Employee Webinars: Mandatory

☐ **Navigation/Settings**

☐ **CRM/Quotes/Orders**

☐ **Production/Invoicing**

☐ **Proofing/Timers**

☐ **CSR/Shipping/Production**

☐ **Prepress/Graphics Designer**

☐ **Accounting**

Employee Webinars: Suggested/Optional

☐ **Job Templates/Products**

☐ **Point of Sale/Customer Goods**

☐ **Canned Emails/Documents**

☐ **Products/Themes/Portals**

☐ **Online Configuration**

☐ **Variable Templates**

☐ **Point of Sale/POS Products**

☐ **Inventory**

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