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GO-LIVE CHECKLIST

SETTINGS > ACCOUNTING

Financial

- **Banking**: All banking information been input.

- **Configuration**: The system has been configured to your specifications and best practices.

- **Order Start Number**: Order Start Number has been set (this 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**: Deposit types you do not want as selectable have been removed and any missing deposit types have been added.

- **Payment Types**: Remove any payment terms that should not be 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?

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.

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SETTINGS > ADMIN

Account

☐ **Customers:** Has your company information been completed?

☐ **Contacts**: Have your employees been added as contacts?

☐ All employees that are users have selectable set to 'Yes' in order to be assigned or selectable in the system.

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

Configuration

☐ **Time Zone**: The appropriate time zone has been selected.

☐ **Date Format**: The desired date format has been chosen.

☐ **Language:** The appropriate language has been selected.

☐ **Measurement Units**: The appropriate measurement unit has been selected.

Custom Export

☐ **Custom Export**: The custom export tool has been reviewed & is understood.

Tools

☐ **Tools**: The tools function has been reviewed & is understood.

Integrations

☐ **Merchant Gateway**: Authorize.net account has been set up in order to accept credit card payments in DocketManager (if applicable)

☐ **Outgoing Mail** (SMTP Server): Integration has been set for outgoing mail sent within DocketManager routed through your server (if applicable)

☐ **Remote Connections**: Integration with Hot Folders has been setup and tested (if applicable)

☐ **Shipping**: Shippo integration has been set up, tested, and 'Test' Auth Token has been replaced with your Live Auth Token.

Security

☐ **Security**: Security roles have been customized and confirmed for all employees.

Time Clock

☐ **Time Clock**: The time clock function has been reviewed & is understood.

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SETTINGS > COMMUNICATIONS

Documents

Quote: Quote document has been confirmed.

Workorder: Workorder document has been confirmed.

Invoice: Invoice document has been confirmed.

Shipping Label: Shipping label document has been confirmed.

Packing Slip: Packing slip document has been confirmed.

Canned Emails

Canned Emails: All canned email responses have been reviewed (including signatures)

Records

Records: The email records function has been reviewed & is understood.

Tasks

Tasks: The tasking system has been reviewed & is understood.

SETTINGS > CUSTOMERS

Budgets

Budgets: Budgets functionality has been reviewed & is understood.

Defaults

Defaults: MIS customer default has been completed.

Import/Export

Import/Export: Import/Export tool has been reviewed & is understood.

Locations

Locations: All customer locations have been reviewed and updated.

Tags

Tags: All customer tags have been reviewed & updated.

SETTINGS > DOCKETS

Cutting

- **Setup:** Setup/minimum prices have been submitted to apply on quotes & orders.

- **Cut Scales**: Cut scales intended to reduce cut prices on stocks as the number of total cuts increases have been applied (if applicable)

Department Items

- **Department Item Review**: All department items have been reviewed, and all necessary entries have been removed.

- **Price Testing**: All department items have been 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**: All defaults have been set appropriately for quotes/orders.

- **Template/Department Item/Press Groups**: All appropriate groups have been added for Job Templates, Department Items and Presses.
  Do not delete a group until all items within the group have been re-assigned.

- **Note Labels**: All appropriate note labels have been created.

Job Templates

- **Job Templates**: All appropriate job templates have been modified, edited, and/or added to the system.

- I**nactive Job Templates**: All irrelevant job templates have been inactivated.

Order Options

- **Item Type**: All applicable item types have been added, reviewed and/or removed.

- **File Group**: All applicable file group types have been added, reviewed and/or removed.

- **Unit of Measure**: Unit of measure has been added, reviewed and/or removed.

- **Order Due Options**: Selectable options have been customized and a default has been set.

- **Invoice Delivery**: Selectable options have been customized and a default has been set.

- **Shipping**: Unit default has been set & boxes have been added.

- **Shipping Type**: Selectable shipping types have been added, customized, and/or removed.

- **Statuses**: All applicable statuses have been customized and/or added.

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SETTINGS > DOCKETS

Press

☐ **Presses:** All applicable presses have been setup, reviewed, and confirmed as complete.

☐ **Presses**: All applicable presses have been price tested and confirmed to be calculating properly.

Production

☐ **Queues**: All application production views & corresponding view types have been set up.

☐ **Workflow**: Production workflow has been set up and tested.

☐ **Queue Priority**: A queue priority has been set for items that have been assigned priority statuses.

Stock

☐ **Stock**: Default stock cut cost and cut price are correct.

☐ **Stock Options**: All stock options and pricing have been imported.

☐ **Stock Tags**: All stock tags have been reviewed, edited and/or customized.

Tags

☐ **Order Tags**: All order tags have been reviewed, customized and/or added.

Timers

☐ **Timer Rates**: All timer rates have been configured properly and tested.

Vendors/Suppliers

☐ **Vendors**: All vendors have been properly added into the system.

☐ **Suppliers:** All suppliers have been properly added into the system.

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ADDITIONAL ITEMS

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?

The system will not allow you to post an order if there is not enough stock quantity on hand. You cannot adjust inventory stock levels until you have created and received a PO for the stock.

Test Quotes & Orders

Have you completed inputting test orders?

☐ **Test Quotes & Orders:** Confirm all test quotes & orders have been deleted (if applicable)

Request your Test Orders to be removed from your 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 two 1-hour booked sessions for the first two 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.

How to submit your 'Go Live' ticket:

1. Open a ticket through the 'Issue' button on your DocketManager Site.
2. Include in the subject line 'Going Live'.
3. Include your actual 'Go Live' date in the ticket.

Once completed, you will receive an invite to schedule your 1 hour session with your onboarding specialist for your first 2 days of 'Going Live'

☐ Go Live Date Scheduled

☐ 1st Day Support Session Scheduled

☐ 2nd Day Support Session Scheduled

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