



Implementation Checklist

1. **Warehouse-Level Settings (Local Configuration)**

Add warehouse name, address, phone, contact email, and timezone
Set instructions for carriers
Configure operating hours
Create docks and load types
Configure appointment fields and custom forms
Set the reference field name (e.g., PO #, Reference Number) and mark it as Required or Optional
Ensure carrier visibility is enabled

2. **Organization-Level Settings (Global Configuration)**

Configure appointment tags
For organizations with multiple warehouses using the same load types, create shared load types

3. **User Setup**

Invite users and assign the appropriate user roles
Users set password from Opendock Nova

4. **Go-Live Validation**

Create and complete a test appointment
Update appointment statuses and review the time-stamped audit log
Verify load types and dock assignments
Confirm all users can log in and navigate the system
Confirm user roles and responsibilities across the warehouse

5. **Use Opendock**

Ensure the Grid View is configured correctly (e.g., *All Docks*, *All Load Types*, *All Statuses*)
Create a Reserve
Reschedule an appointment
Review Carrier Insights, Warehouse Insights, and Reporting