

docketmanager
The Management System By Printers For Printers



Message From The CEO:

Our company's main focus has been improving tools and resources for our clients to ensure easier implementation and ongoing user improvement.

Each year our goal is to release quarterly versions, each with at least half of the features being requests from our user community. We are proud to see an amazing amount of growth in our community of users, all of whom are willing to help each other out with their questions, issues or suggestions.

Mark Darling
Chief Executive Officer, DocketManager Inc.

DOCKETMANAGER IS A FULLY INTEGRATED MIS & WEB-TO-PRINT CLOUD-BASED MANAGEMENT SYSTEM BUILT BY PRINTERS FOR PRINTERS

Why Choose DocketManager?

Our biggest satisfaction comes from seeing our clients succeed! The Support and Training programs at DocketManager are what set us apart. With continuous results and significant transformations, we do not just help solve one single problem or create isolated improvements, we wire the system to imitate and enhance your existing business. We manage and train our clients on the system to improve proficiency and to create dynamic users so that they are getting the most out of their investment with us.

Our people are experienced. Over 70% of our staff comes directly from the print industry which helps us to work closely with our clients to provide insight and guidance in transforming each customized DocketManager system. We walk our clients through each step of the process, teaching them how to use the program while we do all the heavy lifting.

Implementation is the first and most important step and often where people struggle the most. We make the implementation as easy as possible for you by importing all of your data, setting up your system, and most importantly, training you on how it all works so that you get the most value out of your DocketManager system!

Our team is composed of senior positions, with renown implementation experience and training services. Training packages are a key feature of DocketManager's educational program.

We offer training packages such as

- Basic User Training
- Group & Personal Webinars
- Advanced User Training
- Onsite Training Packages
- Web to Print Training

Our web-to-print and MIS have a fully integrated 2 way communication, meaning any updates to specs or pricing on the MIS translate live to the web-to-print. It also means all orders coming through the web-to-print or status updates being sent back are instantaneous.

DocketManager offers everything you will need to be successful, and will be there for you every step of the way.

Over the last year:

3,180

Items Processed Per Day

255,205

Total Customers Managed

156

Emails Delivered Per Hour

15,798

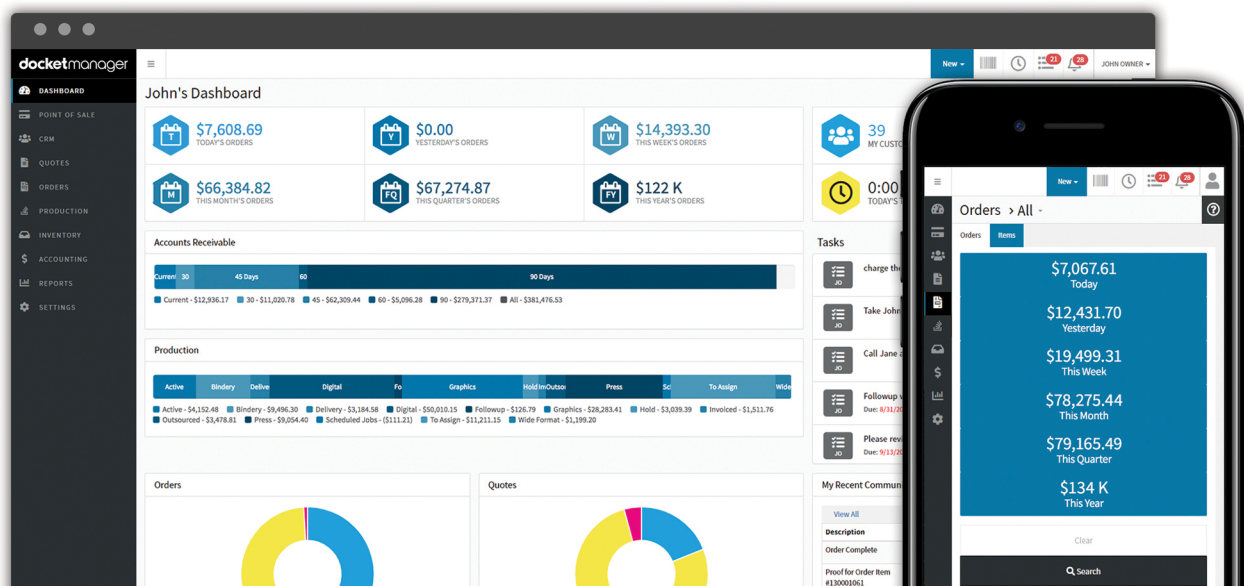
Proof Approvals Received

56,109

Online Products

40,309

W2P Users



What We've Been Doing Lately:

In the last year we have released 4 versions and over 300 enhancements.

We have been working on additional interface enhancements to increase the usability for our clients. We have partially updated the UI style and reduced the number of table views. To make learning and using DocketManager more efficient, we have implemented tooltips and on-screen access to our support articles on almost every page.

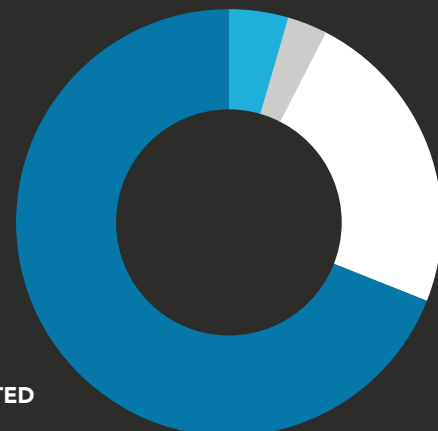
Our upgrades have also included:

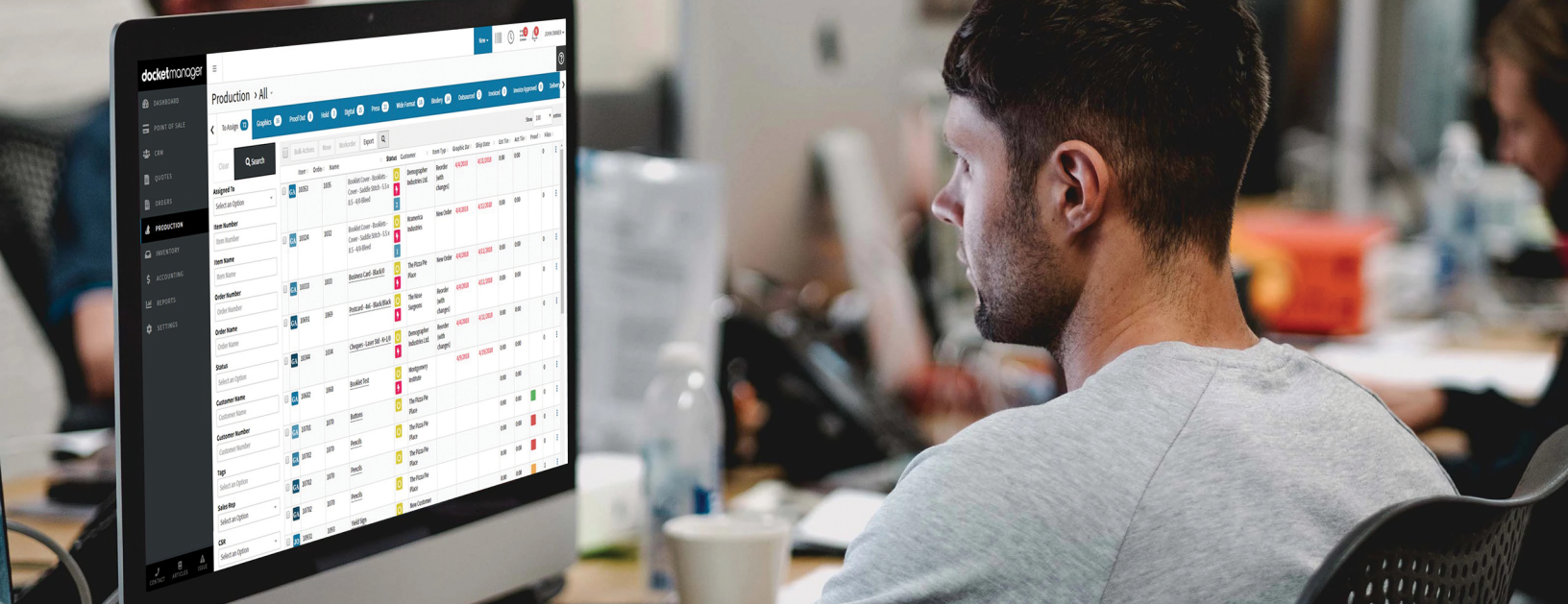
- Quick Add Items
- Additional Action Menus
- Outsourced Types
- Custom sort for Product Attribute

Listening to our customers

We now have 568 Feature Requests on our Forum and 53 Discussion Topics

- 176 are implemented
- 15 are in progress
- 28 are in planned





Some of our main features include:



Customizable Production Views

Each queue can be setup with its own customizable cardview. Choose the information and search filters that should display on each view and control the layout of the page. An Active User view has been added as well, allowing each individual user to view their items and organize them according to priority.



File Repositories

In addition to order items, files can now be uploaded to customers, contacts, orders, stock and supplies. Use them to store logos, contracts, warehouse agreements, user guides or MSDS.



Stock Inventory Enhancements

Several upgrades to the stock inventory feature have been made, including direct Purchase Order reservation from order items, and simplified imports of initial and updated 'on hand' values.



Budgets

Help your customers by setting up budgets and keeping track of their balances. Budget periods can be created manually or scheduled yearly, monthly or weekly with automatic balance roll overs.



Universal Tags

The HTML tags used for populating information on generated documents are now shared with emails and the production card view.



Unlimited Credit Processing Accounts

Sites can now support multiple credit processing accounts with one or both of our credit card processing providers. Portals can be assigned to use separate accounts, and preferences can be set based on customer/contact level.

cardconnect®

We have a new partnership with CardConnect that makes accepting credit card payments simple, secure and reliable. This will give our customers an alternate option for an integrated credit card processor.

DOCKETMANAGER'S ONLINE WEB-TO-PRINT PORTALS FEATURE FLEXIBLE, CUSTOM THEMES & UNLIMITED STOREFRONTS

Design/Layout

Upload and organize eye catching thumbnails and catalog images. The site can be structured in unlimited variations based on client needs and products. Use the homepage to promote discounts, deals, and new products. Custom pages can be created with additional information about your company or products, making it feel like your actual website. Knowledge of HTML, CSS, and Javascript allow limitless design capability.

Access

Online access is contact, portal and product driven. Custom security roles can be created to grant access to pages, control what actions are possible or hide pricing.

Favorites

Your customers can select their most ordered items to display on their favorites page. Just one simple click adds or removes an item, which helps make the ordering process simple and easy for your clients.

Public

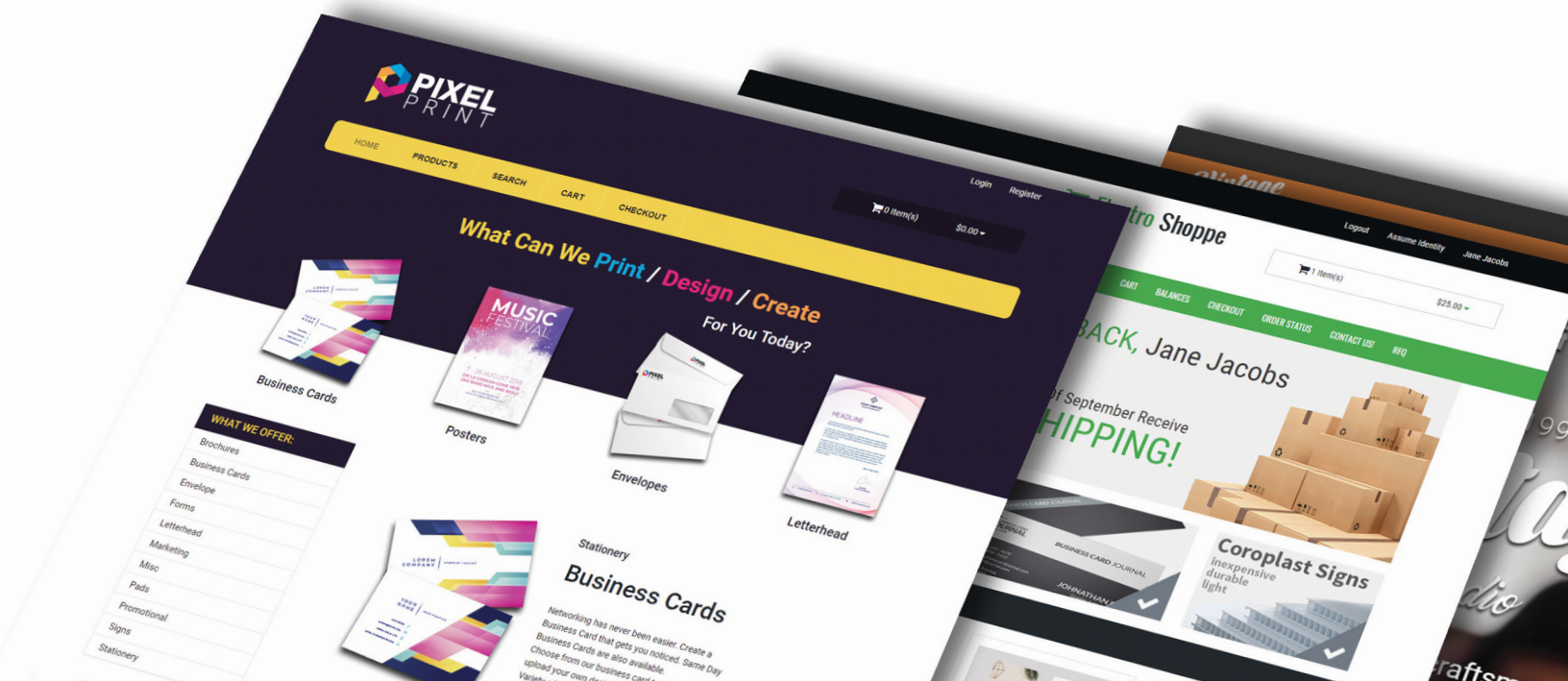
Public or private products can be accessible as B2C or as additional options for your clients. Online registration and pre-set customer defaults allows new customers to create accounts and begin placing orders.

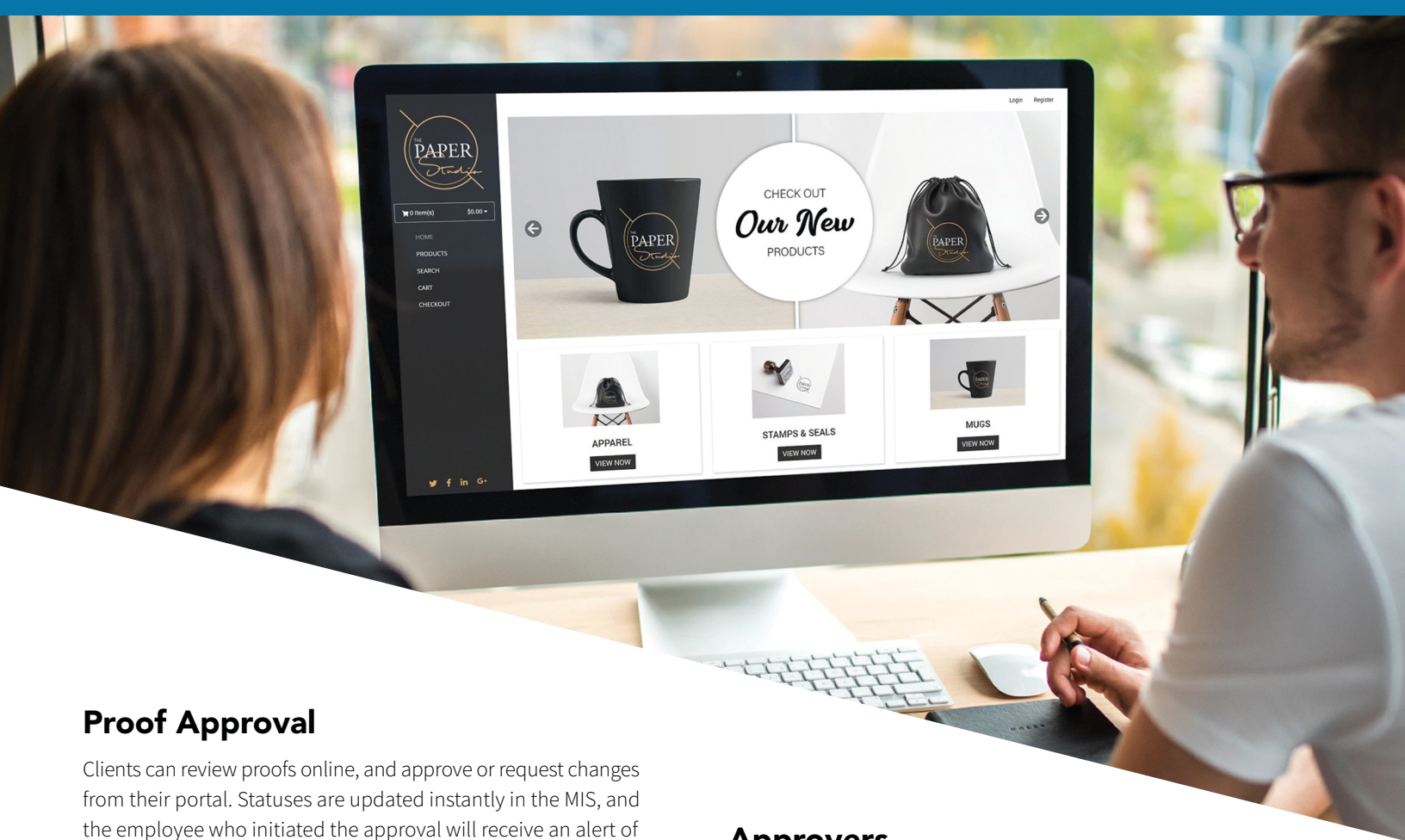
Products

Create static or variable products for your customers or generic products with finishing and stock options. You can limit quantities available or allow clients to choose any quantity within a set range. Customers can upload artwork or files, select boxes, and set weight for estimated shipping.

Quote Approval

The customizable quote page allows clients or prospects the ability to review quotes online. Desired products and quantities can be selected and the estimate will automatically convert to an order in the MIS system.





Proof Approval

Clients can review proofs online, and approve or request changes from their portal. Statuses are updated instantly in the MIS, and the employee who initiated the approval will receive an alert of the status update.

History

Each user can be given access to see the history of their individual orders or view the history of the entire company's. Users can see the status of each order and reorder with a single click.

Admin

Pass control off to your customer's admin users and allow them to add, delete, and/or maintain company contacts and online users. Let them be in charge of assigning the correct roles and products for each user.

Approvers

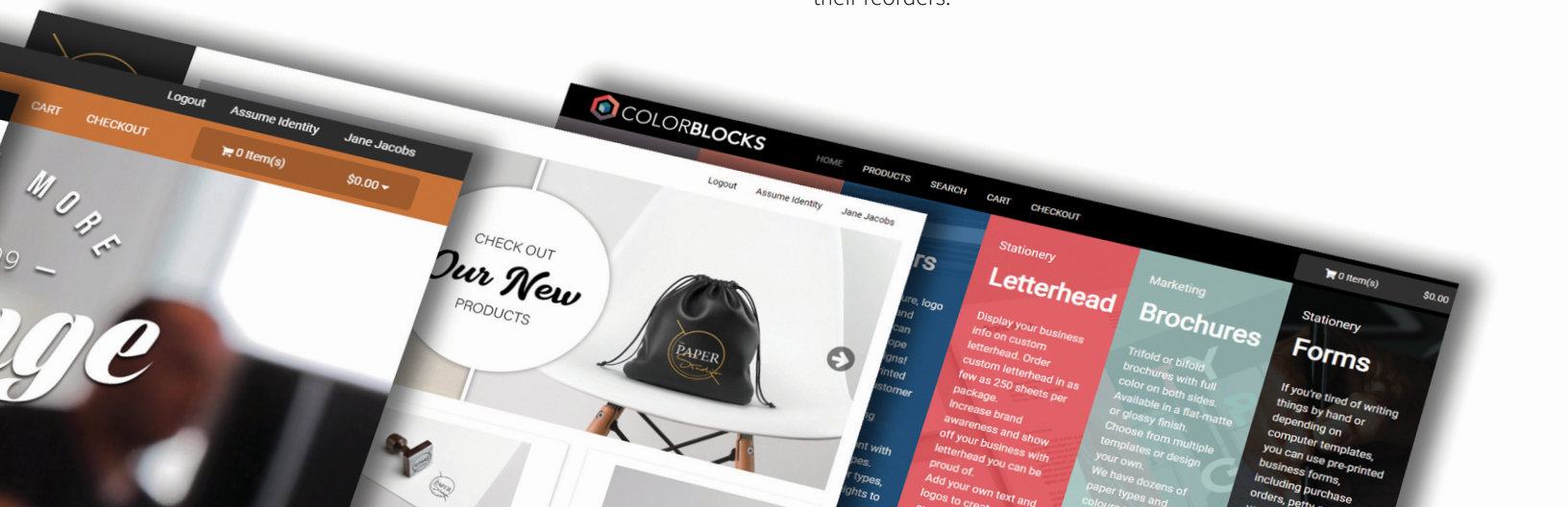
Single or multiple levels of order approvals can be set based on each contact in a portal. Clients receive email notifications at each step in the approval process. Orders are not submitted to the MIS until final approval is given.

Balances

Using our credit card integrations clients can pay their outstanding balances online. Security settings allow a user to see or print a statement of just their unpaid orders or the entire company's.

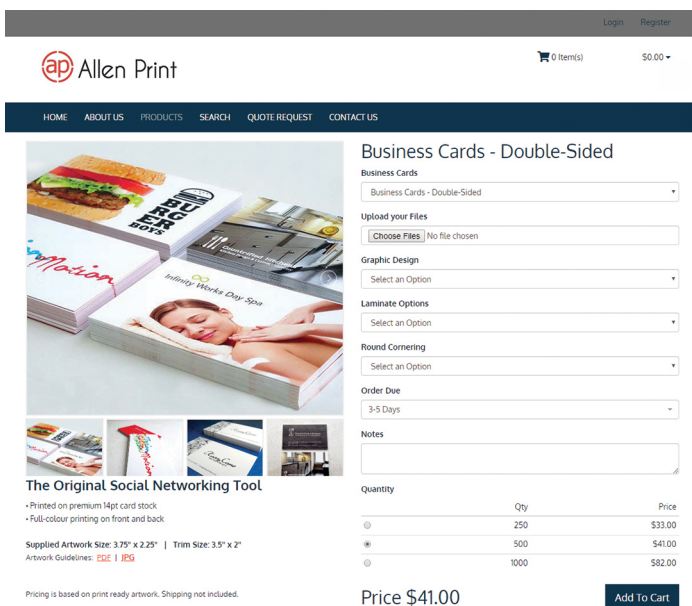
Inventory

If you store finished goods or shells for your customer you can allow them to see the inventory levels online so they can better manage their reorders.



Portal Showcase

DocketManager's web-to-print portals allow custom CSS and Javascript to be added to the portal's design for limitless possibilities. Here are some of our favorite portals that have been customized by DocketManager users.

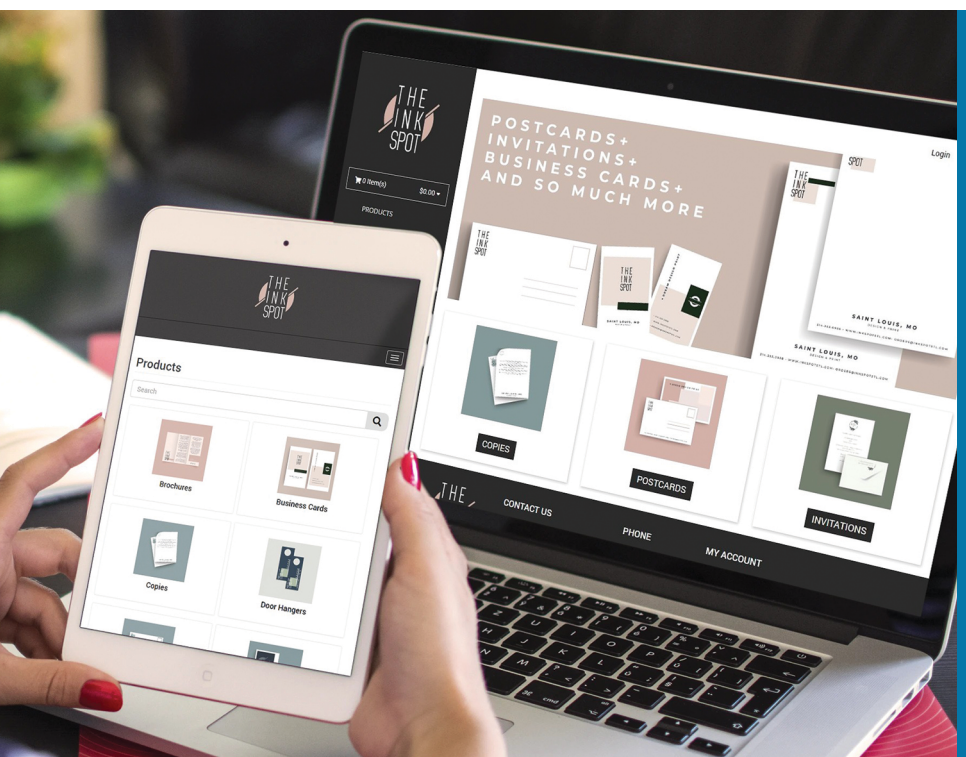


Allen Print

Allen Print, located in Dartmouth, Nova Scotia, has been using DocketManager since 2015. Cameron and his team have been an integral part in the growth of DocketManager with both their feedback and willingness to beta test our new versions. They have fully embraced our customizable portals, and have even replaced their conventional website with one of their branded portals.

Using our Electro Green theme, the Allen Print team swapped the side menu and welcome images in the Home Page HTML for a slider that showcases their popular products and monthly promotions.

We especially like Allen Print's Product pages which utilize the product's Online Message option to give details on the product. They have also added product attributes to many of their products which allow customers to customize the products according to their needs.



The Ink Spot

Located in St. Louis, Missouri, Cathie and The Ink Spot team joined DocketManager in 2016. They have been a great team to work with throughout the past few years. They just recently jumped right into our web-to-print section and very quickly created something very beautiful.

The Ink Spot chose our Charcoal Studio theme and customized it with their pastel colors and images.

The Ink Spot's Products page showcases their beautiful and colorful product images with simple blocks for each catalog and lots of white space.

501 Printing

Seth, from 501 Creative Group in Fort Worth, Texas, is new to DocketManager but has wasted no time setting up his web-to-print. He has been so easy to work with and generous with us sharing some of his creativity and knowledge.

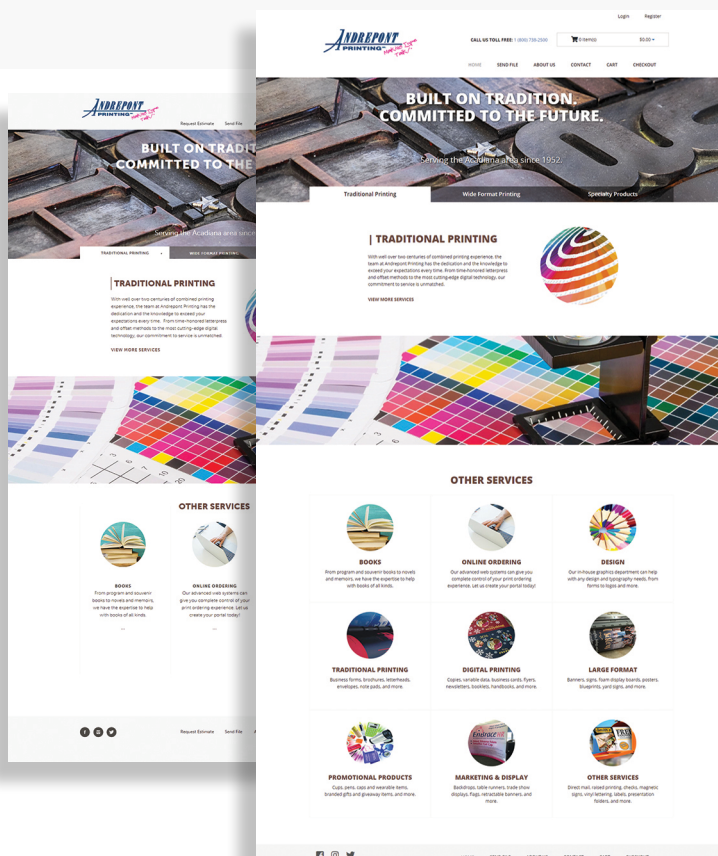
We love the bold colors and textures on 501's portal. Layering their paper products with different textures (such as brick and wood) along with their vibrant choice in color makes their portal aesthetic very dynamic.

Seth used transparent PNGs for their catalog images which allows him to set a consistent background color for all images and will be an easy change if he ever decides to switch it up.



“Online ordering is one of the best ways to offer value to customers, and because DocketManagers’ web portal is all integrated, it’s easy to add products to a clients’ online store. If it isn’t easy to do, it will not get done, and that is where DocketManager is miles ahead of its competition - ease of use.

- Calvin Frey, Innovative Designs



Andrepoint Printing

Andre from Andrepoint Printing contacted us to inquire about getting his existing website design replicated in a DocketManager portal. While he liked the themes we had to offer, he liked the website he already had and was hoping not to lose the look his customers had come to know.

Using our Electro Green theme as a base, our support team was able to recreate his website as a portal almost exactly including custom “About Us” and “Contact” website pages.

Now Andre’s customers are able to access a website that is familiar to them with the added function of being able to order their products directly from the storefront website.

MIS - Everything Working Together As One Fluid Solution

Getting Organized

Tired of sticky notes and scrap pieces of paper?

Most shops use multiple platforms or actual files and paperwork to run things which can lead to things getting overlooked or forgotten, but with DocketManager you can organize all your information in one place.

Use the note sections throughout the system to note particulars about jobs, stocks, presses and customers, add notes for the little things like what a client likes in their coffee for the next time you see them. Use tasks to assign work to your staff, set reminders to follow up on outstanding invoices, quotes and proofs. Use the Authorize.net integration to store your client's credit cards securely, for fast and easy use. Use tags to organize your customers into sales areas or by type so that you can easily create segregated marketing lists. Use the customer settings and defaults to assign their most used payment terms, shipping method and tax rate, or assign documents or canned emails by the correct brand.

Everything you need all in one place.

Always Connected

When's the last time you went on vacation?

Booking a vacation can sometimes feel like more of a burden than a relaxing holiday. A lot of effort goes into preparing for departure or worrying things may fall apart while you are gone. Staying connected with DocketManager will put your worries at ease.

Being 100% cloud based means that you are no longer tethered to a desk, and you have full access to your entire business from almost anywhere. This means you can access that quote or invoice your forgot to send before you left, keep an eye on the production queues, and view all orders coming in to get the peace of mind that progress and profit didn't just stop when you left.

It doesn't stop there. Sales Reps can check on their orders or create quotes on the fly while visiting clients, Production Managers can see all the new orders coming in the night before a big production day, and CSR's or Account Officers can post or send invoices after hours to ensure payment gets collected on time.

Keeping shops connected.

Empower the Team

Does everything seem to fall on you?

More often than not, teams are under utilized. The accounting department may solely be responsible for processing all payments, or an owner or estimator is required to create all quotes - regardless of how simple they may be. DocketManager enables their users to pass some of the responsibility off to the rest of their team.

Estimators can easily create a large selection of basic products through DocketManager's POS system and Job Template options. With these products, the customer service reps are able to create accurate quotes quickly and consistently without errors. Generating accurate invoices and quotes is easy, and encouraging other team members to send invoices and quotes, or follow up on outstanding balances, creates faster turnarounds from quote to order, order to invoice, and invoice and payment. The Accounting, CSR, and even the Graphics or Prepress departments are capable of collecting credit card payments by using the credit card profiles stored under each Customer.

Team members can also assist in setting up online portals for the customers, which means some of the responsibility can later be passed onto your clients by allowing them to place and approve orders online, and pay for their purchases virtually. DocketManager's fluid solution allows users to effectively utilize their team, which allows owners the time to focus on other responsibilities - like expanding business!

Helping to build more powerful teams.

Increase Efficiency

Remember when customers were happy with a 10 day turnaround?

Today, everyone wants everything immediately. With DocketManager, you can connect with your customer faster and increase the efficiencies of your internal workflow. Customers can approve or request changes on proofs, approve quotes, and pay balances online with DocketManager's W2P portals. The customer's online order submissions fall directly into DocketManager's MIS, making the W2P and MIS connection harmonious & efficient.

The MIS converts quotes into orders with a single click, redirecting the orders into the customizable production workflow. All pertinent files and artwork can be uploaded right to the job, and Hotfolders can be connected to drop the files right in the press folder. Create custom statuses for an easy visual information reference, and have rush and priority jobs bumped right to the top of the queue. Use the advanced filters to find jobs with common specs to avoid frequently swapping out paper trays or doing extra washups, and save those searches for the future with our user specific smart lists. Use timers to track real production time to identify bottlenecks or to improve on time estimates. Having someone monitor the invoicing queue means invoices are sent out sooner which results in getting paid faster.

Increasing production and cashflow.

John's Dashboard

\$7,608.69
TODAY'S ORDERS

\$0.00
YESTERDAY'S ORDERS

\$14,393.30
THIS WEEK'S ORDERS

\$66,384.82
THIS MONTH'S ORDERS

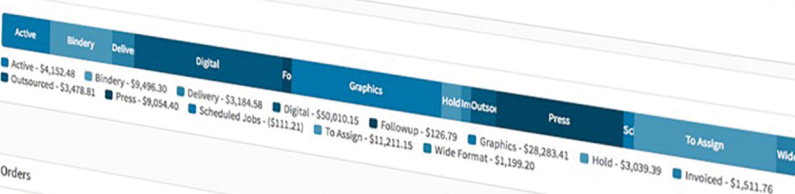
\$67,274.87
THIS QUARTER'S ORDERS

\$122 K
THIS YEAR'S ORDERS

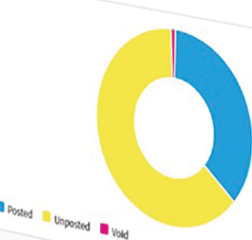
Accounts Receivable



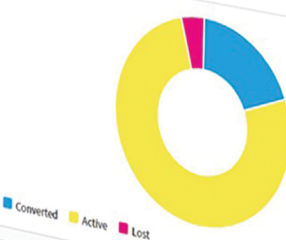
Production



Orders



Quotes



Wednesday, August 28, 2019

39
MY CUSTOMERS

63
MY QUOTES

0:00
TODAY'S TIMERS

206
MY ORDERS

Tasks

- charge the rest to the client's card when job ships
- Take John samples on next visit
- Call Jane about Grading Opening order ETA
- Followup with the customer to see if they were happy with the job.
Due: 8/31/2018
John Owner 3/25/2018
- Please review my work
Due: 9/13/2018
Patti Cakes 9/18/2018

My Recent Communications

Description	Customer	Status	Sent
Order Complete	WW Candy Shoppe		
Proof for Order Item #130001061	ABC Test Company (QA Test Customer - Defaults)		3/3/2019
Proof for Order Item #130001071	ABC Test Company (QA Test Customer - Defaults)		3/1/2019
Quote #1082	ABC Test Company (QA Test Customer - Defaults)		3/1/2019

Choosing the right MIS for your business



DON'T just browse around, DO determine why you are looking

Review all your current processes and then identify the current obstacles and inefficiencies. This formula will give you a better understanding of the problems that need to be solved.

If you already have a current MIS, review what it has to offer along with its upcoming features to determine if your issues are a limitation of the software or the way in which you are using it.

When looking at new software, keep a list of your current issues with you and prioritize them. Sometimes, issues can be lumped into categories, and smaller issues can be solved with some creative thinking. Remember why you are looking, and compare if the benefits of a new product outweigh any features you might be losing from your current system.

DON'T just look at the amount of work, DO consider if it will be worth it in the long run

Transitioning to a new MIS can be very time consuming.

Not only do you need to analyze your current processes, you have to integrate a system into your current workflow, learn the interworkings of the dynamic software, and train the rest of your employees to create a comfortable transition.

Implementation of a new product can take time, and odds are you're almost an expert at your current process. It takes time to become a power user, which means you didn't become that expert overnight.

Although important, don't look solely for a product that is easy to setup. Ensure the company is going to be there to help assist you during the setup phase, offer onsite, in-class and webinar training, has easily accessible written material providing user instructions, and provides a library of video documentation on how to use the system.

Having a system isn't helpful if you don't have support, understand how to use, or know how to maintain it.

DON'T try to find a perfect match, DO look for a best fit

Do not choose a product based on one demonstration or conversation. It's important the product is a good fit, but it's also important to choose the company that is the right fit for you. Ask questions about the company, their plans for growing and developing, and their relationships with their customers. Don't just assume the product will do exactly what you want. Research the product to make sure the features or future features are headed in the direction that you plan for your company.

DON'T impulse buy, DO your due diligence

Do not choose a product based on one demonstration or conversation, make sure not only the product but the company is a good fit for you. Ask questions about the company, their plans for growing and developing, their relationships with their customers, etc. Research the product to make sure the features or future features will work for you, also look at the day-to-day flow, don't just assume it will do exactly what you want.

DON'T focus only on the now, DO consider how this product will impact your future

Don't get sucked in by fancy features or a discounted offer. Make sure the product and the company are planning for a successful future. Part of getting to know the company is determining if the product is part of their primary focus, or if it's considered a side project. Is the company going to stop developing the product? Is it so simple that you can learn everything in a week, or is it more complicated than necessary? How will the answers to these questions effect your future growth.

COMPARE DOCKETMANAGER TO OTHER MIS & YOUR NEEDS

docketmanager					NOTES
Features					
Integrated Web-to-print	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Unlimited Store Fronts	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Enhanced Estimating	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Comprehensive CRM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Customizable Production	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Budget Control	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Inventory Management	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Shipping & Fulfillment	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Task/Sales Management	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Outsourcing Support	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Credit Card Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Time Tracking	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Customizable Security	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Cloud Based	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Assisted Setup	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Custom Training Packages	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
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Users					
Price					

Case Studies

An indepth review of some of our user's struggles and successes with previous processes, DocketManager and the buying process.



Indox Services

The Overview

Tony Cracchiolo owns Indox Services in St. Louis, M.O. For 75+ years the full service digital print provider has been helping local and national companies communicate with their customers through print solutions. The Indox team is made up of 25 employees supporting an annual revenue of \$2-3 million.

The Issue

Using a host of non-connected applications, Tony and his team were seeing an inconsistent, slow response to their customers and found it very difficult to understand the metrics of the business. "We were missing details on jobs and making mistakes because we had no way to record the details that were needed" says Tony. He decided to start looking at other options that were web based and one complete software, no plug in modules.

The Decision

For a year, Tony and an IT member searched for a new solution for the business. They were introduced to DocketManager at a trade show and were also looking into a similar product. Ultimately they found DocketManager to be a more complete product and made the investment.

The Implementation

With the assisted setup and onsite training package, the Indox team went live with DocketManager in 6 months. Other than a change to the look and feel, the implementation of a new system had no negative impact on their customers and they have only gotten positive responses. Their favorite part of the system is the ability to input all necessary information to generate accurate work orders.

The Results

With a full year of daily use, their processes have become smoother. Tony and his team are sending quick and accurate quotes and now have a better way to track overall inventory amounts. They have found it takes a new employee approximately 3 months to get up to speed with DocketManager and their daily responsibilities. Tony also attended an in-class training for the online ordering portion and has created a dozen or so portals for his customers.

“Love the product can't wait for the next upgrades.

- Tony Cracchiolo, Indox Services

Innovative Ink

The Overview

With 2 locations, one in Millbank, ON, and one in Waterloo, ON, Innovative Ink employs 50 employees and generates \$6-7 million in annual revenue. Calvin Frey, President and Founder, started the full service design, web, print, mail, and signage company 11 years ago. He has a lot of responsibility on his shoulders but a strong team at his side, "The goals and vision for the company are almost entirely driven by me", said Calvin, "I have been blessed with an excellent team around me to help."

The Issue

With a rapidly growing company, Calvin needed a way to help control the growth curve and have clarity throughout the whole operation. He described his previous process as "A recipe for mistakes" and "Painful".

The Implementation

Calvin and his team implemented DocketManager in 2013, and as they grew, each new member became a DocketManager user. They utilize almost all the platform has to offer, from customer management, production and scheduling, to reporting and sales strategy. They started using the online ordering system early on and have more recently began creating custom portals for some of their customers.

The Outcome

In the 6 years Innovative Ink has been using DocketManager, they have noticed a significant reduction in order entry times, including limited re-entry touch points from quotes, to orders, to work orders, to invoices. The purchase and transition of a second location was made easier because DocketManager. As the solution is a web-based application, they were able to keep both locations running on one system. They have transitioned numerous customers to online ordering and are finding the online ordering to be a huge growth potential for them.



WP&B

The Overview

Willamette Print & Blueprint (WP&B) is an all-inclusive print service provider serving Oregon and Southwest Washington's design and building community. Established in 1975, WP&B utilizes the latest digital technologies to provide a wide range of reprographics and graphic imaging services. Available services range from electronic document management, color digital imaging, photocopying, CAD plotting, and high-speed large format printing.

The Issue

Utilizing several previous systems and process, David Guzman, Vice President, and his team were struggling with access to information and matching quoting with existing orders. As described by David, "We needed to improve our estimating and CRM systems." They began looking for a web-based product with online ordering and CRM that also included billing and production management.

The Decision

After 2-3 years of searching, a referral from a current user, and reviewing their options, David and the President, Neil Humphrey, chose DocketManager. They liked the fully integrated online ordering, estimating, production management, inventory control and CRM that DocketManager offers.

The Implementation

The WP&B team took advantage of DocketManager's assisted setup and onsite training package. Once the DocketManager support team had the site setup, the onsite training team travelled to Oregon to assist David and the team at WP&B with the implementation. Although they needed to be flexible with some of their current processes, they were able to successfully implement the system in 6 months and have now been live for 4.

The Results

After using the product regularly, they have found the reordering very helpful and use it often. The sales and executive team have seen an improvement in the access of information and billing flexibility has become a favorite part of the product. They hope to get the online ordering portion implemented in the near future and expect that it will lead to an increase in revenue.

“ You listen and sincerely try to assist us in our business. I appreciate that DM is constantly evolving and that you implement customer suggestions!

- **David Guzman, WP&B**

Allen Print

The Overview

Located in Dartmouth, N.S., Allen Print Ltd. is a commercial print shop offering offset, digital and wide format services. Owned by Cameron Struthers, Allen Print has been in business for 75 years, employs 12 employees, and has an annual revenue of approximately \$2 million.

The Issue

After implementing an alternative solution, the Allenprint team found it was just not the right fit and couldn't handle all of their needs. During their search for a new solution, they found DocketManager.

The Implementation

Utilizing the whole Allen Print team, they did their own setup, implemented DocketManager and went live in under 2 months. Using the custom portals they created a web-to-print portal

for their customers and even replaced their own website with DocketManager powerful web-to-print platform.

The Results

Over the 4 years they have been live they have seen better control of current paper pricing and workflow efficiency. Being web-based, Cameron has found value in being able to assist his team even when offsite. They have found the online ordering has been a good retaining tool for some of their repeat customers.





Need a complete management system?

Contact us today for a free demo.



docketmanager
The Management System By Printers For Printers

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