

# Prebooks Quick Start Guide

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# Overview

Welcome! This guide is designed to get you started on processing Prebooks in Komet.

## What is a Prebook? What information does a Prebook have?

Prebook is a pre-sell (not yet an invoice) for a customer.

In order to generate a Prebook record, it must include the following fields. Products and prices can be added later.

- 1 Customer
- 2 Truck Date
- 3 Carrier

Komet Sales - Developers  
900 Brickell Avenue # 32111  
MIAMI, FL 33131  
Phone 988766567  
Fax 123423423

**Customer**  
9D FLOWERS  
3024 NW  
MIAMI, FL 33122

**Ship To**  
9D FLOWERS  
3024 NW 72ND AVE  
MIAMI, FL 33122

**Prebook #** 016734  
**Truck Date** 07/11/2019  
**Amount** \$190.00  
**SO #**  
**Customer PO #**  
**Sales Rep** Francisco Giron  
**Account Number** 130  
**Carrier** Delivery

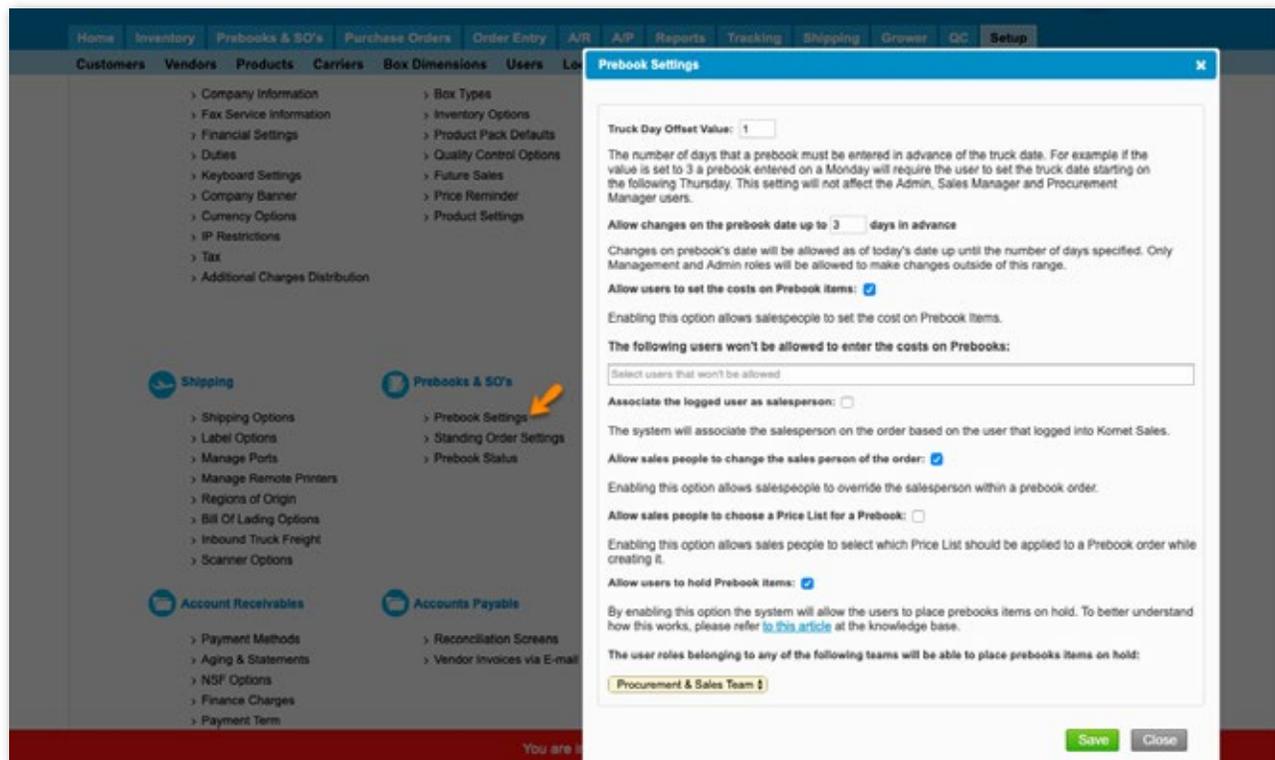
Description	Quantity	Type	Stems Bunch	Unit Type	Price	Units/Box	Total Units	Amount	
Assorted Gerbera	10	FB	10	Bunch	\$ 1.900	10	100	\$190.00	
<b>Totals</b>							10	100	\$190.00

## What Is the purpose of creating a Prebook

- Prebooks allow to create an internal record of a customer's request.
- Salespeople create the Prebook and once the product is available, the Prebook is used as the basis for creating the Invoice for the customer.
- Prebooks inform the Procurement team which products they must request from their vendors to supply the customer's needs.

## I want to set up my Prebooks in Komet. What do I do first?

By default, your salespeople will be able to start using Prebooks in Komet, however, you might want the Prebooks feature to adapt to your company's specific needs. By going to **Setup>>Settings>>Prebook Settings** you will be able to setup different restrictions in Prebooks creation: possibility of editing cost, prices, salesperson, set price lists, hold Prebook items, among other actions. Some of the settings can be set up on a per location basis in the case of multi-location companies. For further information on these options, read [Prebook Settings and Restrictions](#).



The screenshot displays the Komet software interface with a 'Prebook Settings' dialog box open. The background shows a navigation menu with categories like Shipping, Account Receivables, Accounts Payable, and Prebooks & SO's. An orange arrow points to 'Prebook Settings' in the 'Prebooks & SO's' category. The dialog box contains the following settings:

- Truck Day Offset Value:** 1
- Allow changes on the prebook date up to:** 3 days in advance
- Allow users to set the costs on Prebook items:**
- Associate the logged user as salesperson:**
- Allow sales people to change the sales person of the order:**
- Allow sales people to choose a Price List for a Prebook:**
- Allow users to hold Prebook items:**

The 'Prebook Settings' dialog box also includes explanatory text for several options, such as 'The number of days that a prebook must be entered in advance of the truck date...' and 'Enabling this option allows salespeople to set the cost on Prebook items.' At the bottom of the dialog, there is a 'Save' button and a 'Close' button. The background interface shows a navigation menu with categories like Shipping, Account Receivables, Accounts Payable, and Prebooks & SO's. An orange arrow points to 'Prebook Settings' in the 'Prebooks & SO's' category.

## I want to create a custom workflow for Prebooks

As an optional step, you can set up a workflow for Prebooks based on different statuses, this will allow you to control for example, when a Prebook will be visible for the procurement team. For further information read [Statuses for Prebooks](#).

The screenshot shows the 'Setup Prebook Status' dialog box. The 'Enable Prebook Statuses' checkbox is checked. Below it, a table lists various statuses and their configurations:

Status	Default	Procurement Visible	Show as Ref # on PO	Show on Sales Screen	Active	Actions
Processed	✓	✓	✓	✓	✓	Edit Delete
Finalized		✓		✓	✓	
Not Processed					✓	
Procurement		✓	✓		✓	
Projection			✓		✓	

An orange arrow in the background points to the 'Prebook Status' option under the 'Prebooks & SO's' menu.

## How can Prebooks be created?

Prebooks can be generated in different ways:

- 1 Manually, either in [boxes](#) or [units](#).
- 2 Through a [Standing Order](#).
- 3 When the system creates an E-commerce order for [Future Sales](#) or [Vendor Availability](#) products.



# We're Here To Help You

Still Need Help? Contact Us!

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[support@kometsales.com](mailto:support@kometsales.com)  
with your inquiry.



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+1 (786) 206-0554



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Star chatting with one of our  
Customer Support Representatives.