

# Standing Orders Quick Start Guide

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# Overview

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

## What is a Standing Order? What information does a Standing Order have?

A Standing Order in Komet is a template that causes the system to generate Prebooks automatically with a specified recurrence and for a certain customer. When certain conditions are fulfilled, the system can also generate Purchase Orders automatically (based on Prebook's information).

Standing Orders must include the following information:

- 1 Customer
- 2 Days
- 3 Starting on date
- 4 Recurrence
- 5 Carrier
- 6 Location (in multi-location companies)

**kometsales**

900 Brickell Avenue # 32111  
MIAMI, FL 33131

Ship To: Customer 4

SO #  
S32495

Start Date: 03/14/2017  
End Date: 04/18/2017

Recurrence: Every 1 week(s)  
Created On: 04/18/2017  
Day(s): Tuesday  
Carrier: Fedex  
Customer: Customer 4 - 18363

Comments:

Vendor	Product	Boxes	Type	Units/ Box	Unit Type	Bun/ Box	St/Bun	Total Units	Price	Total Price
V2	50 Golden Sunflower	5	FB	7	Bunch	7	5	35	\$3.50	\$122.50
V2	Euro White Pom Novelty	10	FB	6	Bunch	6	4	60	\$2.00	\$120.00
<b>Totals:</b>		<b>15</b>				<b>13</b>		<b>95</b>		<b>\$242.50</b>

## What Is the purpose of creating a Standing Order

- To save time since it avoids having to create the same prebook again and again.
- To ensure Procurement has adequate time to order product from your vendors.

# I want to start using Standing Orders in Komet. What do I do first?

- 1. Activate the setting:** This can be done from the Standing Order settings. The system will ask for the number of days before the Truck Date for generating the Prebooks.
- 2. Set up the creation rules for Purchase Orders:** The system provides the option to generate the Purchase Order based on the Prebook as well as sending the Purchase Orders automatically by email.
- 3. Customize the Standing Order changes notification:** Once a modification is made to a Standing Order the system can inform vendors and users within your company. This setting must be set up on a per location basis in multi-location companies.

For further information read Settings for [Standing Orders](#).

The screenshot shows the 'Standing Order Settings' window in the Komet Sales application. The window title is 'Standing Order Settings' with a 'Need help?' button. The settings are as follows:

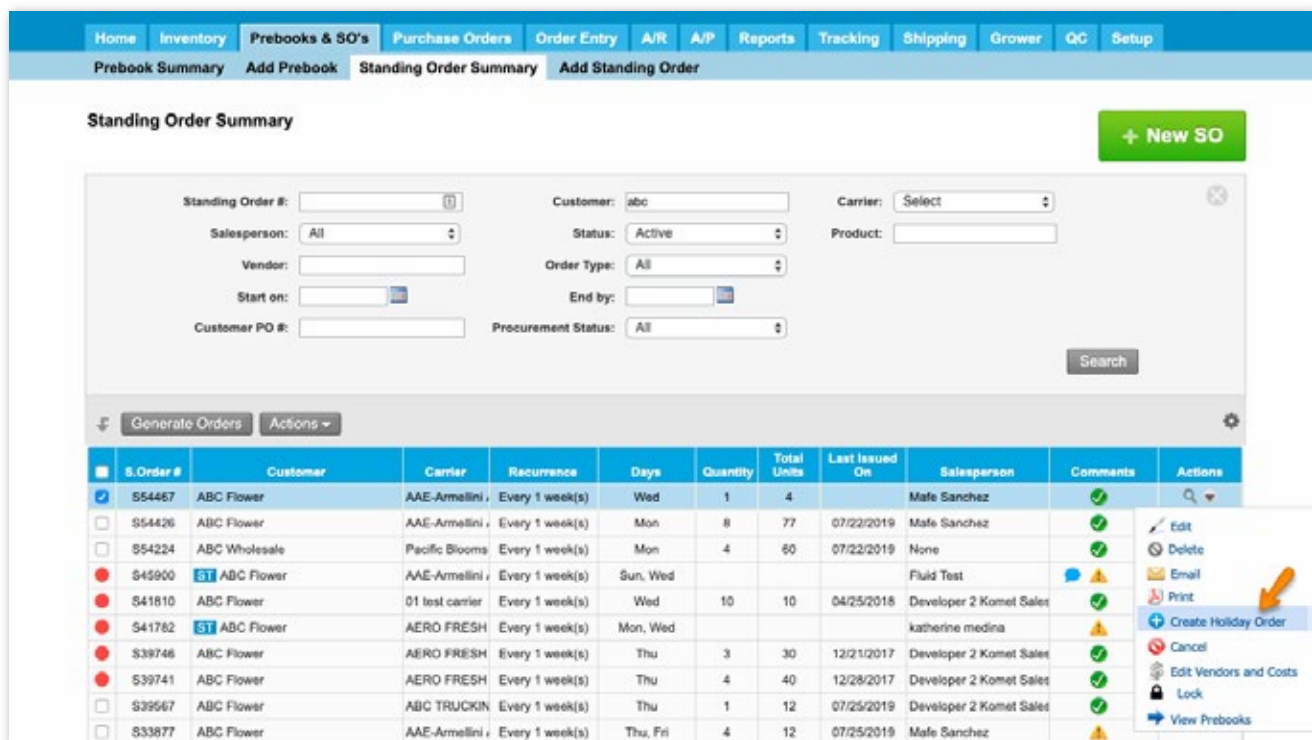
- The automatic generation of Prebooks and Purchase orders (Future Sales) based on Standing Orders is **Enabled**.
- Prebooks and Purchase orders (Future Sales) will be automatically created **15** days before the Truck Date.
- The Purchase Orders for Standing Order products will be created **automatically** and sent via email **automatically**.
- The system **should** create the Purchase Order if the Standing Order is not completed.
- The system will calculate the grower ship date for the purchase orders with the number of days prior to the truck date as specified for each port in the [Manage Ports](#) section.
- Associate the logged user as salesperson:**  (The system will associate the salesperson on the standing order based on the user that logged into Komet Sales.)
- Allow sales people to change the sales person of the order:**  (Enabling this option allows salespeople to override the salesperson within a standing order.)
- Enable SO Changes Notifications:**
- Send Notifications with Copy to:** (Email notifications sent to vendors when there is any change in a Standing Order should be copied to: )
- Reply Notifications To:**
- Always Send Notifications:**  (By enabling this option, the system will always send notifications to the vendor and to the emails entered above without asking the user each time a Standing Order is modified.)

At the bottom of the window, there are 'Save' and 'Close' buttons.

## How to create Standing Orders doubles

There will be cases in which you may offer to double up the customer's Standing Orders during the holidays. In these cases, the **"Holiday Orders"** feature comes in handy since you can easily double up their orders without affecting the [automatic generation of Prebooks and PO's from Standing Orders](#)

Holiday Orders can be generated massively or individually, from the Standing Order Summary.



The screenshot displays the 'Standing Order Summary' page in a web application. At the top, there is a navigation bar with tabs for Home, Inventory, Prebooks & SO's, Purchase Orders, Order Entry, A/R, A/P, Reports, Tracking, Shipping, Grower, QC, and Setup. Below this, there are sub-tabs for Prebook Summary, Add Prebook, Standing Order Summary (selected), and Add Standing Order. A green '+ New SO' button is located in the top right corner.

The main content area features a search form with the following fields:

- Standing Order #:
- Customer:
- Carrier:
- Salesperson:
- Status:
- Product:
- Vendor:
- Order Type:
- Start on:
- End by:
- Customer PO #:
- Procurement Status:

A 'Search' button is located at the bottom right of the search form. Below the search form, there are 'Generate Orders' and 'Actions' buttons.

The main data table has the following columns: S.Order #, Customer, Carrier, Recurrence, Days, Quantity, Total Units, Last Issued On, Salesperson, Comments, and Actions. The table contains several rows of data, including:

S.Order #	Customer	Carrier	Recurrence	Days	Quantity	Total Units	Last Issued On	Salesperson	Comments	Actions
554467	ABC Flower	AAE-Armellini	Every 1 week(s)	Wed	1	4		Mafe Sanchez	✓	⌵
554426	ABC Flower	AAE-Armellini	Every 1 week(s)	Mon	8	77	07/22/2019	Mafe Sanchez	✓	⌵
554224	ABC Wholesale	Pacific Blooms	Every 1 week(s)	Mon	4	60	07/22/2019	None	✓	⌵
545900	ABC Flower	AAE-Armellini	Every 1 week(s)	Sun, Wed				Fluid Test	⚠	⌵
541810	ABC Flower	01 lost carrier	Every 1 week(s)	Wed	10	10	04/25/2018	Developer 2 Komet Sales	⚠	⌵
541782	ABC Flower	AERO FRESH	Every 1 week(s)	Mon, Wed				katherine medina	⚠	⌵
539746	ABC Flower	AERO FRESH	Every 1 week(s)	Thu	3	30	12/21/2017	Developer 2 Komet Sales	✓	⌵
539741	ABC Flower	AERO FRESH	Every 1 week(s)	Thu	4	40	12/28/2017	Developer 2 Komet Sales	✓	⌵
539567	ABC Flower	ABC TRUCKIN	Every 1 week(s)	Thu	1	12	07/25/2019	Developer 2 Komet Sales	✓	⌵
533877	ABC Flower	AAE-Armellini	Every 1 week(s)	Thu, Fri	4	12	07/25/2019	Mafe Sanchez	⚠	⌵

An 'Actions' menu is open for the first row, showing options: Edit, Delete, Email, Print, **Create Holiday Order** (highlighted with an orange arrow), Cancel, Edit Vendors and Costs, Lock, and View Prebooks.



## How to identify Holiday Orders

Prebooks coming from holiday orders will have a D prefix as shown on the next screenshot:

Prebook Summary

View the prebooks in the Standard view, [Fulfillment view](#) or the [Allocations view](#)

Prebook #:  Truck Date From: 08/09/2017 Truck Date To: 09/30/2017  
Customer:  Carrier: All Salesperson: All  
Product:  SO #: S36998 Customer PO #:   
[Shortcuts](#)

Prebook #	SO #	Customer PO #	Customer	Carrier	Truck Date	Salesperson	Total	Quantity	Comments	Actions
<input type="radio"/> 006964	S36998		Customer 4	01 test carrier	Thu 09/28	Carlos Restrepo	\$ 1,654.00	60		
<input checked="" type="radio"/> D006963	S36998		Customer 4	01 test carrier	Mon 09/25	Carlos Restrepo	\$ 1,654.00	60		
<input type="radio"/> D006960	S36998		Customer 4	01 test carrier	Thu 09/28	Carlos Restrepo	\$ 1,654.00	60		
<input type="radio"/> D006959	S36998		Customer 4	01 test carrier	Mon 09/25	Carlos Restrepo	\$ 1,654.00	60		
Totals:							\$6,616.00	240		

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## What actions can be carried out with Standing Orders?

There are several actions that can be carried out with Standing Orders:

- Send by Email
- Print
- Lock
- Cancel
- Reactivate
- View which Prebooks are associated to a given Standing Order

Standing Order Summary

Standing Order #:  Customer: ABC Carrier: Select  
Salesperson: All Status: Active Product:   
Vendor:  Order Type: All  
Start on:  End by:   
Customer PO #:  Procurement Status: All

S Order #	Customer	Carrier	Recurrence	Days	Quantity	Total Units	Last Invoiced On	Salesperson	Comments	Actions
<input checked="" type="checkbox"/> S5492	ABC Flower	AME Arnelini	Every 1 week(x)	Wed	1	4		Maha Sanchez		<input type="button" value="View Prebook"/>
<input type="checkbox"/> S54526	ABC Flower	AME Arnelini	Every 1 week(x)	Mon	8	77	01/22/2019	Maha Sanchez		<input type="button" value="View Prebook"/>
<input type="checkbox"/> S54524	ABC Wholesale	Pacific Boxes	Every 1 week(x)	Mon	4	60	01/23/2019	Nora		<input type="button" value="View Prebook"/>
<input type="checkbox"/> S4300	ABC Flower	AME Arnelini	Every 1 week(x)	Sun, Wed				Floral Test		<input type="button" value="View Prebook"/>
<input type="checkbox"/> S4190	ABC Flower	01 test carrier	Every 1 week(x)	Wed	10	10	04/25/2018	Developer 2 Haniel Sainz		<input type="button" value="View Prebook"/>
<input type="checkbox"/> S4170	ABC Flower	AERD FRESH	Every 1 week(x)	Mon, Wed				wholesale machine		<input type="button" value="View Prebook"/>
<input type="checkbox"/> S3974	ABC Flower	AERD FRESH	Every 1 week(x)	Thu	3	30	12/11/2017	Developer 2 Haniel Sainz		<input type="button" value="View Prebook"/>
<input type="checkbox"/> S3971	ABC Flower	AERD FRESH	Every 1 week(x)	Thu	4	40	12/08/2017	Developer 2 Haniel Sainz		<input type="button" value="View Prebook"/>
<input type="checkbox"/> S3957	ABC Flower	ABC TRUCKIN	Every 1 week(x)	Thu	1	12	01/25/2019	Developer 2 Haniel Sainz		<input type="button" value="View Prebook"/>
<input type="checkbox"/> S3897	ABC Flower	AME Arnelini	Every 1 week(x)	Thu, Fri	4	12	01/24/2019	Maha Sanchez		<input type="button" value="View Prebook"/>



# We're Here To Help You

Still Need Help? Contact Us!

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**Send us an e-mail to**  
[support@kometsales.com](mailto:support@kometsales.com)  
with your inquiry.



**Call us at**  
+1 (786) 206-0554



**Use our Live Chat**  
Star chatting with one of our  
Customer Support Representatives.