

Standing Orders Quick Start Guide



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)

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
Totals:		15				13		95		\$242.50

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:

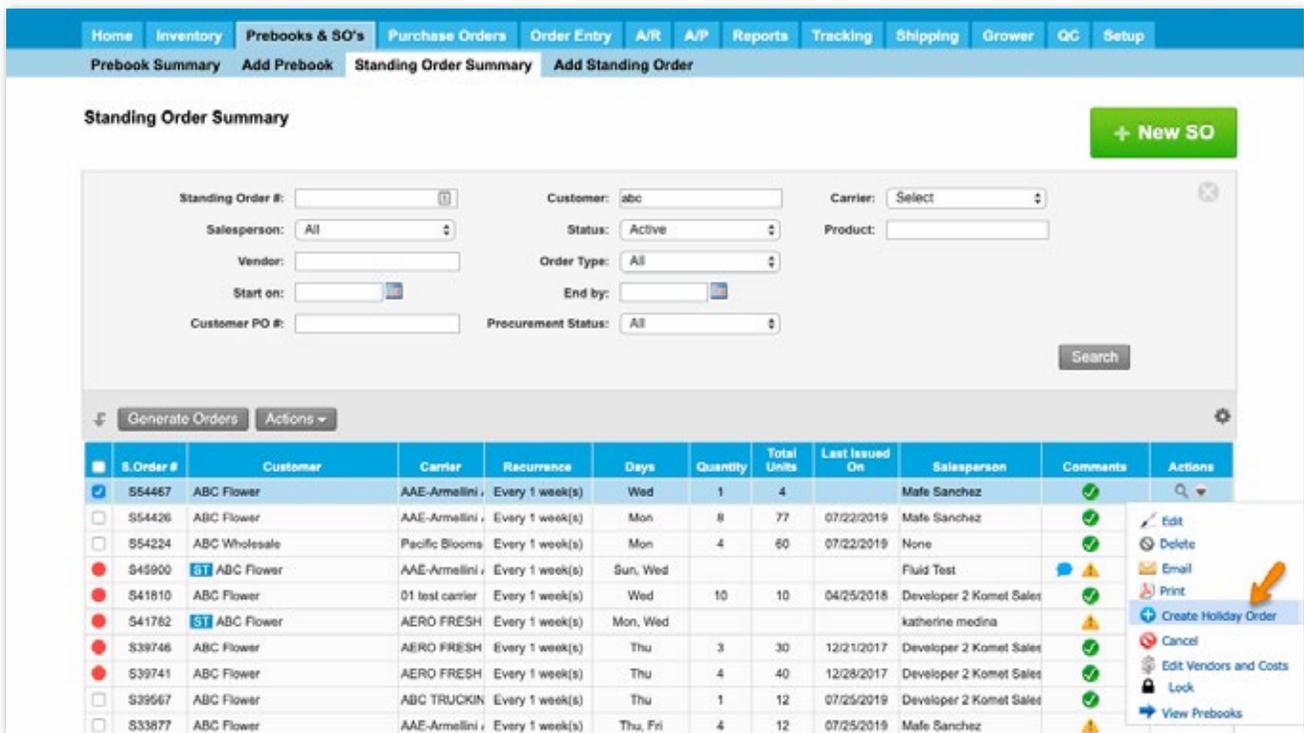
Please enter one email address per line.
- Reply Notifications To:**
- Always Send Notifications:** By enabling this option, the system will always send notifications to the vendor and to the emails entered above without asking the user each time a Standing Order is modified.

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 orders for ABC Flower, ABC Wholesale, and ABC Flower with various carriers and recurrence patterns.

An 'Actions' menu is open for the first row (S.Order # 554467), showing options: Edit, Delete, Email, Print, **Create Holiday Order** (highlighted with an orange arrow), Cancel, Edit Vendors and Costs, Lock, and View Prebooks.

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	⚠	✓



How to identify Holiday Orders

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

Prebook #	SO #	Customer PO #	Customer	Carrier	Truck Date	Salesperson	Total	Quantity	Comments	Actions
D006964	S36998		Customer 4	01 test carrier	Thu 09/28	Carlos Restrepo	\$ 1,654.00	60		
D006963	S36998		Customer 4	01 test carrier	Mon 09/25	Carlos Restrepo	\$ 1,654.00	60		
D006960	S36998		Customer 4	01 test carrier	Thu 09/28	Carlos Restrepo	\$ 1,654.00	60		
D006959	S36998		Customer 4	01 test carrier	Mon 09/25	Carlos Restrepo	\$ 1,654.00	60		
Totals:							\$6,616.00	240		

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

S Order #	Customer	Carrier	Recurrence	Days	Quantity	Total Units	Last Invoiced On	Salesperson	Comments	Actions
S5492	ABC Flower	AME Arnelini	Every 1 week(x)	Wed	1	4		Maha Sanchez		Send by Email, Print, Cancel, Create Holiday Order, Lock, Unlock, View Prebooks
S54526	ABC Flower	AME Arnelini	Every 1 week(x)	Mon	8	77	01/22/2019	Maha Sanchez		
S54524	ABC Wholesale	Pacific Boxes	Every 1 week(x)	Mon	8	60	01/23/2019	Nora		
S4300	ABC Flower	AME Arnelini	Every 1 week(x)	Sun, Wed				Floral Test		
S4190	ABC Flower	01 test carrier	Every 1 week(x)	Wed	10	10	04/25/2018	Developer 2 Haniel Sainz		
S4170	ABC Flower	AERD FRESH	Every 1 week(x)	Mon, Wed				wholesale machine		
S3974	ABC Flower	AERD FRESH	Every 1 week(x)	Thu	3	30	12/11/2017	Developer 2 Haniel Sainz		
S3971	ABC Flower	AERD FRESH	Every 1 week(x)	Thu	4	40	12/08/2017	Developer 2 Haniel Sainz		
S3957	ABC Flower	ABC TRUCKIN	Every 1 week(x)	Thu	1	10	01/25/2019	Developer 2 Haniel Sainz		
S3957	ABC Flower	AME Arnelini	Every 1 week(x)	Thu, Fri	4	12	01/25/2019	Maha Sanchez		



We're Here To Help You

Still Need Help? Contact Us!



Send us an e-mail to
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.