

Prebooks Quick Start Guide



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

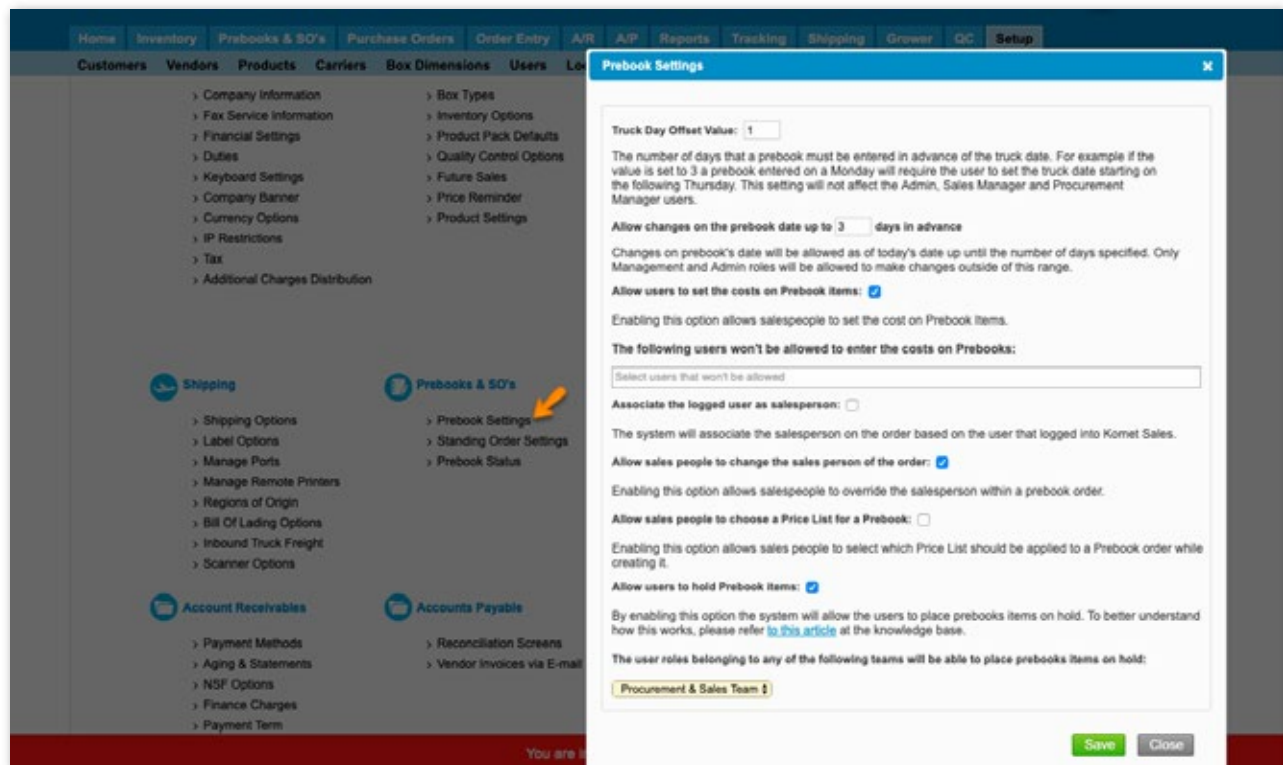
Description	Quantity	Type	Stems Bunch	Unit Type	Price	Units/Box	Total Units	Amount
Assorted Gerbera	10	FB	10	Bunch	\$ 1.900	10	100	\$190.00
Totals	10						100	\$190.00

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, and Accounts Payable. The 'Prebook Settings' dialog box contains the following configuration options:

- 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:**

At the bottom of the dialog box, there is a 'Save' button and a 'Close' button. A dropdown menu shows 'Procurement & Sales Team'.

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](#).

Setup Prebook Status

Enable Prebook Statuses:

By enabling this option, the system will allow you to create, edit, delete, activate and deactivate different statuses for Prebooks. Keep in mind that this setting will only apply for Prebooks created as of its activation.

Status	Default	Procurement Visible	Show as Ref # on PO	Show on Sales Screen	Active	Actions
Processed	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit Delete
Finalized		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Not Processed					<input checked="" type="checkbox"/>	
Procurement		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
Projection			<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	

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Add new status

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
with your inquiry.



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+1 (786) 206-0554



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