To-do lists

- **Company Analysis & Basecamp Project Setup**

  o Customer: Confirm that management is committed to move forward.
  o Customer: Confirm the company employees are willing to use Komet.
  o Customer: Ensure the company reads and understands Privacy Policy.1 comment
  o Customer: Ensure the company reads and understands Terms of Service.1 comment
    Customer / Komet: Add people that will be involved with the Basecamp project.
  o Customer / Komet: Set a Go Live Date. 1 comment

- **Data Import**
  Data that needs to be loaded to Komet.

  o Customer: Payment Methods 1 comment
  o Customer: Payment Terms 1 comment
  o Customer: Manage Ports 1 comment
  o Customer: Upload customer master list to Basecamp. 1 comment
  o Customer: Upload customer ship to's. 1 comment
  o Customer: Upload product list to Basecamp. 1 comment
  o Customer: Upload vendor list to Basecamp. 1 comment
  o Customer: Upload carriers list to Basecamp. 1 comment
  o Customer: Upload product pack list to Basecamp 1 comment
  o Customer: Upload Box Dimensions Template to Basecamp. 1 comment
  o Customer: Upload Open Invoices list to Basecamp. 1 comment
  o Customer: Verify (spot check) all imported data to Komet Sales. 1 comment

- **System Setup**
  Configure the system based on the type of operation.

  o Customer: Make sure that users have Google Chrome or Firefox as your Internet Browser. 1 comment
  o Customer: Setup Company Users. 1 comment
  o Customer: Setup your Company's Information. 1 comment
  o Customer: Setup your Financial Settings. 1 comment
  o Customer: Setup your Company's Logo. 1 comment
  o Customer: Setup Sales Tax. 1 comment
  o Customer: Setup the invoice Footer disclaimer. 1 comment
  o Customer: Setup the Fax Service (Optional) 1 comment
  o Customer: Setup the Ports of Origin 1 comment
  o Customer: Setup and verify the configuration of the shipping schedule by port of origin as well as the shipping schedule within each vendor account (when applicable)
  o Customer: Setup the Duties (If applicable) 1 comment

- o   Customer: Setup the Vendor Users. 1 comment
- o   Customer: Configure the 2 character label prefix and printing preferences.1 comment
- o   Customer: Setup the Box Dimensions by Vendor and Product Category (If applicable) 1 comment
- o   Customer: Activate the default Product Packs. 1 comment

- • **Sales Setup**

- o   Customer: Determine if the automatic scheduled delivery of invoices will be used. 1 comment
- o   Customer: Setup the "Open Market" account. 1 comment
- o   Customer: Setup the "Future Sales" account. 1 comment
- o   Customer: Setup the Fuel Surcharge under the company settings (if applicable) 1 comment
- o   Customer: Setup the Fuel Surcharge for each individual account (if applicable)1 comment
- o   Customer: Setup Sales Tax per customer (if applicable)

- • **Training**
  Each session is intended to be 1 hour or less. Additional sessions can be scheduled for larger groups upon request.

- o   Komet: Admin and Settings. 1 comment
- o   Komet: Sales - Standing Order & Prebook. 1 comment
- o   Komet: Sales & Procurement Managers - Standing Order Settings. 1 comment
- o   Komet: Sales 2 - Future and Open Market Sales. 1 comment
- o   Komet: Procurement 1 comment
- o   Komet: Quality Control & Vendor Credits. 1 comment
- o   Komet: Inventory Management. 1 comment
- o   Komet: Accounting. 1 comment
- o   Komet: Warehouse Management Training. 1 comment
- o   Komet: E-commerce Training (if applicable). 1 comment
- o   Komet: Reports

- • **Hardware Setup**
  Printers and scanners

- o   Customer: Identify if Automatic Remote Printing will be used. 1 comment
- o   Customer: Printers: Setup the printers in the application. 1 comment
- o   Customer: Printers: Test documents printer (Invoices, BOL, Pick Tickets)
- o   Customer: Printers: Test label printer.
- o   Customer: Scanners: Verify the Wifi is available in the warehouse and obtain the public IP address. 1 comment
- o   Komet: Scanners: Configure the IP in the AWS security group 1 comment

- o   Komet: Scanners: Setup scan user in Komet and send customer the user information. 1 comment
- o   Customer: Scanners: Test scanner. 1 comment

- • **<u>Customer & Vendor Notifications</u>**

- o   Customer: Notify your vendors about the new system change. 1 comment
- o   Customer: Notify customers of E-commerce capabilities (If applicable)1 comment

- • **<u>Shipping Setup</u>**
  Make sure to have the shipping settings setup one week prior to going live

- o   Komet: Setup the Armellini EDI (If applicable) 1 comment
- o   Komet: Test the Armellini EDI (if applicable)
- o   Komet: Setup the Prime EDI (if applicable) 1 comment
- o   Komet: Test the Prime EDI (if applicable)

- • **<u>Checklist Before Live Date</u>**
  List of items that need to be completed prior to going LIVE

- o   Customer/ Komet: Setup and follow SO process before Go live (if applicable)1 comment
- o   Customer: Stop sales around noon the day before go live
- o   Customer: Transfer the Inventory from the old system to Komet Sales the day before go live (if applicable). 1 comment
- o   Customer: Print labels and re-label all Inventory boxes the day before go live (if applicable).
- o   Customer: Perform a physical Inventory scan the day before go live (if applicable). 1 comment
- o   Customer / Komet: Set the Invoice # to use. 1 comment
- o   Komet: Clean Up test information entered during the implementation process.1 comment