

TEMPLATE

Komet Sales Implementation

To-do lists

Basecamp Project Setup

- Add the people that will be involved with project on Basecamp
- Assign the person and due date to the To Do's

Billing Setup

- Setup credit card on Chargify for recurring billing
- Set the company ID in the Chargify profile
- Setup the number of users in the account

Company Analysis

- Confirm that company employees are willing to use a new system (Week 1, Monday)
- Confirm that management is committed to move forward (Week 1, Monday)
- Ensure that company reads and understands privacy policy (1 comment) (Week 1, Monday)
- Ensure that company reads and understands terms of service (1 comment) (Week 1, Monday)
- Reconfirm that company employees are willing to move forward (Week 1, Monday)
- Receive a signed copy of the implementation manifest from managers and key personnel

System Setup

Configure the system based on the type of operation

- Subscribe the new company in Komet Sales (1 comment) (Week 1, Monday)
- Setup the company users (1 comment) (Week 1, Monday)
- Setup the company information (1 comment) (Week 1, Monday)

- Setup the system logo (1 comment) (Week 1, Monday)
- Setup the ports of origin (1 comment) (Week 1, Monday)
- Setup the financial settings (1 comment)
- Setup the fax service (1 comment)
- Setup the grower users (1 comment)
- Setup the duties
- Setup the taxes
- Setup the invoice footer disclaimer
- Configure the 2 character label prefix
- Setup the support options based on subscription plan

Data Import

Data that needs to be loaded in the system (we will help you load the data)

- Upload customer master to Basecamp (1 comment)
- Upload product list to Basecamp
- Upload vendors to Basecamp
- Upload carriers to Basecamp
- Customer verifies (spot checks) the imported data
- Import product list to Komet Sales (Daniel Giraldo)
- Import carriers to Komet Sales (Daniel Giraldo)
- Import customer master to Komet Sales (Daniel Giraldo)
- Import vendors to Komet Sales (Daniel Giraldo)

Sales Setup

- Determine if the automatic email/faxing service will be used
- Setup the "Open Market" account
- Setup the "Future Sales" account
- Setup the Fuel Surcharge under the company settings

- Setup the Fuel Surcharge for each individual account

Standing Order Setup

- Setup and verify the configuration of the shipping schedule by port of origin as well as the advanced shipping schedule per vendor (when applicable)
- Setup the standing order settings [1 comment](#)
- Enter the standing orders into the system (done by the sales team 2 weeks prior to go live date)
- Procurement department must review Standing Order costs and vendors to ensure that all orders have a green checkmark
- Lock all the standing orders once each order has been verified by the procurement team
- Run the standing order process ONCE to generate the prebooks for the next 7 days [1 comment](#)
- Procurement team will check to make sure that the prebooks and purchase orders are generated with the correct farm ship dates / truck dates.
Make any necessary adjustments on the Standing Orders, Prebooks and Purchase Orders.

Shipping Setup

Make sure to have the shipping setup one week prior to going live

- Setup the box dimensions [1 comment](#)
- Setup the Armellini EDI
- Test the Armellini EDI
- Setup the Prime EDI
- Test the Prime EDI

Integrations

Setup the integrations with external systems

- Setup FTD product mappings
- Setup Pennock uploads
- Setup Floralship
- Setup Carlstedts

Hardware Setup

Printers, scanners and browsers

- Browsers: Make sure that users have Firefox or Google Chrome
- Install the printer component in the server where the printers are installed
- Printers: Test label printer (this must be done 2 weeks prior to going live)
- Printers: Test document printer
- Printers: Setup the printers in the application
- Scanners: Verify that Wifi is available in warehouse
- Scanners: Setup scan server user in the scanning server
- Scanners: Setup app scan user in Komet
- Scanners: Send scanner info to scanner vendor
- Scanners: Test scanner (this must be done 2 weeks prior to going live and on all the scanners)
- Scanners: Get public IP address from warehouse
- Scanners: Configure the IP in the AWS security group

Training

Each session will last less than 45 minutes

- Warehouse Training Session 1 [1 comment](#)
- Warehouse Training Session 2 [1 comment](#)
- Warehouse Training Session 3 [1 comment](#)
- Warehouse Training Session 4 [1 comment](#)
- Sales Training Session 1 [1 comment](#)
- Sales Training Session 2 [1 comment](#)
- Sales Training Session 3 [1 comment](#)
- Sales Training Session 4 [1 comment](#)
- Purchasing Training Session 1 [1 comment](#)
- Purchasing Training Session 2 [1 comment](#)
- Purchasing Training Session 3 [1 comment](#)
- Purchasing Training Session 4 [1 comment](#)

- Purchasing Training for Grower Portal Session 1 [1 comment](#)
- Inventory Management Training Session 1 [1 comment](#)
- Inventory Management Training Session 2 [1 comment](#)
- Admin Training Session 1 [1 comment](#) [Week 1, Monday](#)

Customer & Vendor Notifications

- Notify vendors of new system [1 comment](#)
- Notify customers of e-commerce capabilities

Checklist for Day Before GO LIVE

List of items that need to be completed the day prior to going LIVE

- Test the document printer
- Test the label printer
- Stop sales around noon
- Transfer the inventory from the old system to Komet Sales
- Print labels and relabel all inventory boxes
- Perform a physical inventory scan
- Set the invoice #, prebook # and standing order #s to use
- Set the box label numbers