










← PROJECT TEMPLATES

Komet Sales Implementation

64 Discussions **85 To-dos** **13 Files** **Events** Add the first: Text document

Discussions

[Watch a quick video about Discussions](#)

- 
Komet B. **Customer / Komet: Set a Go Live Date.** - Based on the quote and the user plan there is a preset date for the Live Day. Please note that you have that specific (1)
- 
Komet B. **Customer: Upload Vendor Contacts (If applicable)** - Vendor Contacts Template.xls  (1)
- 
Komet B. **Customer: Upload Customer Open Credits.** - Use this template to upload all open credits to each customer account. These will be uploaded as  (1)
- 
Komet B. **Customer: Upload customer master list to Basecamp.** - Download the Customer Template file and upload it once again as a comment below. Be  (1)
- 
Komet B. **Customer: Upload Product pack list to Basecamp** - Product Packs are required when Vendor Availability will be used in E-commerce. Note: keep in  (1)

[59 more discussions](#)

To-do lists

[Watch a quick video about To-Do Lists](#)

Company Analysis & Basecamp Project Setup

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

System Setup

Configure the system based on the type of operation.

- Customer: Make sure that users have Google Chrome or Firefox as your Internet Browser. (1 comment)
- Customer: Setup Company Users. (1 comment)
- Customer: Setup your Company's Information. (1 comment)
- Customer: Setup your Financial Settings. (1 comment)
- Customer: Setup your Company's Logo. (1 comment)

- Customer: Setup Sales Tax. [1 comment](#)
- Customer: Setup the invoice Footer disclaimer. [1 comment](#)
- Customer: Setup the Fax Service (Optional) [1 comment](#)
- Customer: Setup the Ports of Origin [1 comment](#)
- 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)
- Customer: Setup the Duties (If applicable) [1 comment](#)
- Customer: Setup the Vendor Users. [1 comment](#)
- Customer: Configure the 2 character label prefix and printing preferences. [1 comment](#)
- Customer: Setup the Box Dimensions by Vendor and Product Category (If applicable) [1 comment](#)
- Customer: Activate the default Product Packs. [1 comment](#)

Sales Setup

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

Standing Order Settings

- Customer: Place Standing Orders in Komet (task for the sales team) 2 weeks prior to Live Day.
- Customer: Establish and verify the Shipping Schedule by Port of Origin as well as the Shipping Schedule by vendor if applicable.
- Customer: Configure Standing Order Settings [1 comment](#)
- Customer: Revision of Costs and Vendors in SO's by the procurement team and ensure all have the green check mark.
- Customer: Lock all SO's once procurement has verified all is correct.
- Customer: Manually generate the SO process ONLY ONCE to generate prebooks for the next 7 days.
- Customer: Procurement verifies and checks that Prebooks and Purchase Orders have been created with the correct farm Ship Date/Truck Date making if necessary adjustments in Prebooks, SO's and Purchase Orders.

Shipping Setup

Make sure to have the shipping settings setup two weeks prior to going live (if applicable)

- Komet: Setup of Armellini EDI/Notify Mark Sterling from Armellini of New Shipper Account/2 weeks before Going Live [1 comment](#)
- Komet: Setup of Prime EDI/Notify Kevin Bergman from Prime of New Shipper Account/2 weeks before Going Live [1 comment](#)
- Komet: Test the Armellini EDI (if applicable)
- Komet: Test the Prime EDI (if applicable)

Hardware Setup

Printers and scanners.

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

Data Import

Data that needs to be loaded to Komet.

- Customer: Manage Ports [1 comment](#)
- Customer: Payment Methods [1 comment](#)
- Customer: Payment Terms [1 comment](#)
- Customer: Setup Company Users
- Customer: Upload customer master list to Basecamp. [1 comment](#)
- Customer: Upload Customer Ship To's (If applicable) [1 comment](#)
- Customer: Upload Product list to Basecamp. [1 comment](#)
- Customer: Upload Vendor list to Basecamp. [1 comment](#)
- Customer: Upload Vendor Contacts (If applicable) [1 comment](#)
- Customer: Upload Carriers list to Basecamp. [1 comment](#)
- Customer: Upload Product pack list to Basecamp [1 comment](#)
- Customer: Upload Box Dimensions Template to Basecamp. [1 comment](#)
- Customer: Upload Hard goods list to Basecamp (if applicable) [1 comment](#)
- Customer: Upload Customer Open Credits. [1 comment](#)
- Customer: Verify (spot check) all imported data to Komet Sales. [1 comment](#)

Training

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

- Komet: Admin and Settings. [1 comment](#)
- Komet: Sales - Standing Order & Prebook. [1 comment](#)
- Komet: Sales - Future and Open Market Sales. [1 comment](#)
- Komet: Sales - Order Entry & Credits [1 comment](#)
- Komet: Sales & Procurement Managers - Standing Order Settings. [1 comment](#)
- Komet: Procurement [1 comment](#)

- Komet: Quality Control & Vendor Credits. [1 comment](#)
- Komet: Inventory Management. [1 comment](#)
- Komet: Warehouse Management Training. [1 comment](#)
- Komet: A/P & A/R [1 comment](#)
- Komet: E-commerce Training (if applicable). [1 comment](#)
- Komet: Reports
- Komet: Need Help/Chat Support Channels

Checklist Before Live Date

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







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

Customer & Vendor Notifications

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

Files

Watch a quick video about Files

 <p>Vendor Contacts Template.xls Added by Komet B. on Nov 9, 2017 · 19 KB</p> <p>1 comment</p>	 <p>Open Credits Template.xlsx Added by Komet B. on Sep 18, 2017 · 9 KB</p> <p>1 comment</p>	 <p>Customer Master List Template (2).xls Added by Komet B. on Sep 14, 2017 · 26 KB</p> <p>1 comment</p>
 <p>Product Pack Template (1).xls Added by Komet B. on Sep 11, 2017 · 22 KB</p> <p>1 comment</p>	 <p>Carriers List Template .xls Added by Komet B. on Sep 11, 2017 · 21 KB</p> <p>1 comment</p>	 <p>Hard Goods List.xls Added by Komet B. on Sep 9, 2017 · 24 KB</p> <p>1 comment</p>

7 more files