
To-do lists

Company Analysis & Basecamp Project Setup

- Set a Go Live Date (1 comment)
- Confirm that company employees are willing to use a new system
- Confirm that management is committed to move forward
- Ensure that company reads and understands privacy policy (1 comment)
- Ensure that company reads and understands terms of service (1 comment)
- Add the people that will be involved with project on Basecamp (1 comment)
- Train users on how to use Basecamp
- Assign the person and due date to the To Do's (1 comment)

System Setup

Configure the system based on the type of operation

- Setup the vendor users (1 comment)
- Browsers: Make sure that users have Firefox or Google Chrome (1 comment)
- Setup the company users (1 comment)
- Setup the company information (1 comment)
- Setup the system logo (1 comment)
- Setup the financial settings (1 comment)
- Setup the fax service (1 comment)
- Setup the ports of origin (1 comment)
- Setup the duties (1 comment)
- Configure the 2 character label prefix and printing preferences (1 comment)
- Setup the box dimensions by Vendor and Product Category (1 comment)
- Setup the default product packs (1 comment)
- Setup the invoice footer disclaimer (1 comment)
- Setup sales tax (1 comment)
- Setup the vendor users (1 comment)

Data Import

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

- Upload customer master to Basecamp (1 comment)

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

Sales Setup

- Determine if the automatic email/faxing service will be used [1 comment](#)
- Setup the "Open Market" account [1 comment](#)
- Setup the "Future Sales" account [1 comment](#)
- Setup the Fuel Surcharge under the company settings [1 comment](#)
- Setup the Fuel Surcharge for each individual account [1 comment](#)

Standing Order Setup

- 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)
- Setup the standing order settings [1 comment](#)
- Enter the standing orders into the system (done by the sales team 2 weeks prior to the live date)
- Procurement department must review standing order costs and vendors to ensure that all orders have a green circle with a 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](#)
[Daniel Giraldo](#)
- Procurement team will check to make sure that the prebooks and purchase orders are generated with the correct farm ship dates / truck dates. If needed Make adjustments on the standing orders, prebooks and purchase orders.

Shipping Setup [1 comment](#)

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

- Setup the Armellini EDI [Daniel Giraldo](#)
- Test the Armellini EDI [Daniel Giraldo](#)
- Setup the Prime EDI [Daniel Giraldo](#)
- Test the Prime EDI [Daniel Giraldo](#)

Hardware Setup

Printers, scanners and browsers

- Install the printer component in the server where the printers are installed (1 comment)
- Printers: Setup the printers in the application (Daniel Giraldo)
- Printers: Test document printer (Daniel Giraldo)
- Printers: Test label printer (this must be done 2 weeks prior to going live) (Daniel Giraldo)
- Scanners: Verify that Wifi is available in warehouse (1 comment)
- Scanners: Get public IP address from warehouse (Daniel Giraldo)
- Scanners: Configure the IP in the AWS security group (Daniel Giraldo)
- Scanners: Setup scan server user in the scanning server (Daniel Giraldo)
- Scanners: Setup app scan user in Komet (Daniel Giraldo)
- Scanners: Send scanner info to scanner vendor (Daniel Giraldo)
- Scanners: Test scanner (this must be done 2 weeks prior to going live and on all the scanners)

Customer & Vendor Notifications

- Notification of vendors about the new system (1 comment)
- Notify customers of e-commerce capabilities (if applicable) (1 comment)

Training

Each session is intended to be 45 minutes or less. Additional sessions can be scheduled for larger groups upon request.

- Admin - Settings & Reports Training (1 comment)
- Sales - Standing Order & Prebook Training (1 comment)
- Procurement - Single & Bulk Purchasing Mode Training (1 comment)
- Sales 2 - Future and Open Market Sales Training (1 comment)
- Vendor Portal & Quality Control/Vendor Credit Training (1 comment)
- Inventory Management (1 comment)
- Accounting Training (1 comment)
- Warehouse Management Training (1 comment)
- E-commerce Training (if applicable) (1 comment)

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 re-label all inventory boxes

- Perform a physical inventory scan
- Set the invoice # to use