**Kerridge**
Commercial Systems

# K8 Sales Portal - Key Functionality Summarized

This document summarizes the features available within the K8 Sales Portal

## Introduction

The K8 Sales Portal is designed to enable a user to place a sales order via the Portal and to have it raised within K8, using this online web based solution. This responsive application, accessible via a browser via the Secure Communication Gateway to K8, is available on a subscription basis only.

Users will login to the Portal using their authorized credentials, as maintained within K8. Once logged in to the Portal, the user is presented with the options for customer lookup, inventory and pricing and My Sales.

When customer lookup is selected, the user may search for a customer account by keying the code, account name/address or part. A list of customers matching the entered criteria will be retrieved from K8 and the user may select the account to process. The user may view top selling products for the current period if the appropriate topic from which to retrieve this data has been configured and is being maintained within K8 Data Warehouse. Customer account address details, together with details of contacts as maintained within K8, home branch, default salesperson and credit manager are displayed within the Portal.

The user can add summary order details such as required date, category and ship method. They may then elect to search for a product using part of the product code or word search. Normal products as defined within K8 may be entered, products requiring tally or configurable kits are not supported. Once selected, available inventory for the product for all branches, together with the customer price as defined within K8 may be viewed. The user will also be presented with, a view of incoming purchase orders and summary detail for the product, all retrieved from K8.

The user may update the quantity required and add to the cart, which also adds it the basket in K8. Options are available to update the cart and to clear items already selected. They then may then continue to select other lines. Once the order has been completed, the user may submit it and this order is then finalized and is ready to be processed within K8.

When inventory and pricing is selected, and no customer entered, the user may enter a product and view available inventory and list prices for the product.

When the user selects My Sales, they may view their sales statistics. Note that the relevant topic must be configured and maintained within K8 Data Warehouse. The view can be restricted to only those sales that are attributed on K8 to that salesperson accessing the data. If not restricted, they can also view the past twelve months and previous twelve months, including number of orders placed and average order value. They may drill into this detail to view summary sales for each period. The user may also view outstanding orders and invoices and may drill further to view line details. They may reorder the products by adding to the cart, these will be re-priced automatically to latest customer terms as defined within K8.

## About Kerridge Commercial Systems (KCS)

KCS provides advanced, fully integrated business systems, installation and support services for the manufacturing, wholesale and distributive markets.
The company has over 40 years of extensive knowledge and experience of working with wholesalers, distributors and manufacturers across many sectors.
The company's class leading solutions are functionally rich and highly flexible.

The KCS product solution set has a track record of delivering wide-ranging benefits including greater operational efficiency, cost savings and resource and asset utilization, together with real-time information for management decision making.

## Contact Kerridge Commercial Systems

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