Kerridge
Commercial Systems

K8 Configurator - Key Functionality Summarised

This document summarises the key functionality available within the K8 Configurator.

Introduction

K8 Configurator is a responsive web app, which can be used on a desktop or tablet device. The product comprises two core components – a facility to maintain configurations, together with the rules and options for each, alongside the ability to raise quotations for configured and non-configured products, and any product available for sale in K8. The product, which is available on a subscription basis, is installed onto a server and connects to K8 to deliver the functionality outlined below.

Upon entering the K8 Configurator, the user may undertake one of the following key functions:

- **Maintain Configurations** – This allows the user to maintain existing configurations, or to create new ones, see below.

- **Enter a new Quote** – This allows the user to enter a new quotation, see below.

- **View exiting Quotes** – this allows a user to view existing quotes. These quotes may be amended up to the point that they are sent to K8 to be created as quotes in the sales order process. Once the quotes are sent to K8, any subsequent changes will be made within K8.

- **Create a Template** – This enables a user to create a template for a product or an entire quote. A template can be selected up by a user, subject to access rights, during the quote creation process to streamline configured product or quote creation. See below.

- **Search the Product Catalogue** – This allows the user to search all products available in the K8 branch to which they have access.

Access rights for the K8 Configurator functions are controlled for a user within K8. These include controlling a user's ability to:

- **Access quotes** – To view in-progress and completed quotes.

- **Access Configurator** – To create, view, edit quotes and to search inventory.

- **Administer the Configurator** – Edit existing configurations or create new ones.

K8 Configurator may also be invoked from within K8 Sales order Entry for the purpose of configuring a selected item. This process is outlined below.

Maintain Configurations

- Configurations are built and maintained within K8 Configurator, these are not replicated to K8. Note that whilst the configurations exist within the Configurator only, component product data including attributes, images, quantity and price are retrieved from K8 as required.

- Product Configurations are assigned a K8 product code. This value is used as the kit product code when the configured kit is imported into a sales order within K8.

Product Configurations are defined within a hierarchy:

- Each product configuration may be assigned a set of rules. These rules determine which components may be available to the user, and this list may be dependent upon previous options selected.

Product:
- Defines the type of product being built.
Product Category:
- This is the sub-type of that product (and ultimately becomes the kit when imported into a sales order within K8).
Product Type:
- These are the individual components that make up the kit. Note that each product type, which will form the individual kit components once imported into a sales order within K8, will be selected from a pre-defined set of criteria, attributes or filters. These filters, or rules which may take the form of questions, will help to guide the user to select the correct components. - Each configuration may have an internal or external description. - Configurations may be restricted to specific branches to control accessibility.

K8

K8 Summary factsheet

Enter a New Quote

A user can enter a quotation for a customer. They can stipulate additional data such as delivery address and required date. The user can add stock items or may initiate the configured item workflow, subject to the rules and options that have been set up for that item.

Once the user has finished the quotation, the user may review the quotation and may make changes to the configuration or add more items. They may then submit the quotation to K8. A quotation is created within K8 and all the stock lines are added. Where a configuration has been submitted, then this is created as a kit, with all of the components and processes added automatically added to the kit.

Create a Template

A user may create a template for a configured product or an entire quotation. These templates are only available for use when the user accesses the Configurator directly, not if invoked from within a K8 sales order.

A quotation template may contain a number of configured or non-configured products – an example use case for this could be where a house-builder is likely to order the same configurations for a number of houses that they are building. During the quote creation process the user would select the quotation template, subject to access rights, make any required modifications, and then submit this to K8.

A product template will contain a single configuration. An example use case is that a business may wish to set up standard configurations for a product that is sold.

The user will be guided through the configuration process for the chosen product, adding components subject to options and rules defined for that configuration. Once completed, this template can then be named and saved within the Configurator and can be selected and used by other users, subject to access rights, during the quote creation process and make any required modifications.

Invoking the Configurator from within K8

The Configurator may be accessed directly, or may be invoked from within K8. The user may invoke the Configurator at line level within K8 sales order entry by entering a product code that has been linked to a Product Configuration defined in the Configurator. The product configuration window will open automatically and the user will then be guided through the same steps as if they had selected that configuration directly from within the Configurator. Once the configuration has been completed, the window will close, and the kit along with all selected components will be added to the sales order.

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 utilisation, together with real-time information for management decision making.

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