K8 Summary factsheet

Kerridge Commercial Systems

K8 WebTrade - Key Functionality Summarised

K8 WebTrade – a Business to Business (B2B) Portal that enables trade customers to place orders, to view account details and to settle their account online.

Introduction

This factsheet provides a summary of features available within K8 WebTrade. As a key component of the K8 suite, K8 WebTrade is pre-integrated with K8 in a number of areas to enable a K8 customer to create an on-line trading capability for new and existing customers. Note that whilst all of the features below may be implemented, there may be instances where site rules and configuration may disable optional features (e.g. user security, implementing an option where a choice of operation is available, etc).

K8 WebTade allows an Authorised Individual (customer) to log onto the site, to browse the products that have been denoted as available for sale within the site, to add products to a basket and to place sales orders online. In addition, the logged on user may access account information, such as account balances and order status detail. This information is retrieved from K8 as required. Customers may also download copy invoices and settle their account online. Once the payment has been processed on the site this is electronically submitted to K8 for allocation. The site may be configured to allow for a defined colour scheme,

Key features of K8 WebTrade include:

- **Site configuration options** – The homepage of the K8 WebTrade site is customisable and allows for text and other details to be added. Product lists, such as featured products, may also be added to the Home Page, together with product images.
- **Product Search** – Once logged onto K8 WebTrade, a customer may search for products using a text search facility or may browse through the product hierarchy to find a specific product.
- **Web order creation** – A customer will log onto K8 WebTrade using their login id and password, which will associate them with their specific customer account within K8. This ensures that all pricing details for selected products are retrieved from K8 for the account/product combination and displayed on the site. The customer may add the chosen product to their basket. Once they have added the products that they require, they can proceed to checkout. At the point of checkout, the customer can add a delivery address if required and an order reference. They may also choose the delivery method for the order from the defined list. Once satisfied, the customer may submit the order – this will create the sales order within K8, where it is then available for further processing. Note that no further amendments may be made to the order within K8 WebTrade once it has been submitted to K8.
- **My Orders view** – Once the order has been submitted, users can access the order via the 'My Orders' tab should they wish to view the order status detail. They may also opt to add the products to the current basket if required.
- **My Invoices view** – Customers can gain access to a list of their previous and current invoices ordered by date (latest to oldest). Users can also drill down on an invoice to view the details of the individual invoice and download as required. This details displayed include information on product codes and descriptions, prices and invoice total including VAT.
- **My Payments view** – Customers can view a list of their past payments, presented in chronological order, and may make a payment on their account, using the secure payment gateway. Once the payment has been successfully concluded, details are imported into the K8 system. Note that the electronic import of the account payment is not an supported feature of K8.07. The customer payment may be accepted on the site, an email is then automatically issued to a nominated user to inform them of the account payment. The customer payment is then manually input to their account.

  They may also view Credit Limit, Available Credit, Total Balance and aged balance and previous payments on their account. Each payment is listed with its reference number.
- **Downloadable documentation** – Customers can download defined documentation that has been made available on the site. Examples of this could be product datasheets or legal documentation.

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- **Feedback option** – A customer on the site can elect to leave feedback by selecting this option. This allows for the customer to select from a number of defined contact options, i.e. communicate either via eMail or by phone.
- **K8 integration** – K8 WebTrade integrates directly with the K8 business management solution and shares the same pricing and stock databases. Note that restrictions may apply to older release versions. Real-time stock levels and customer specific prices as maintained within K8 may be displayed on the site in real-time. All orders placed through K8 WebTrade are automatically and immediately transferred to K8 for processing. Incoming orders to K8 can be configured to be automatically suspended, requiring review prior to release for picking or processed automatically to produce a picking note, invoice or backorder.
- **Analytics dashboard** – A built-in sales dashboard allows for sales values captured within K8 WebTrade to be viewed. Daily and weekly sales values can be viewed, as can those from previous months.
- **Admin messages** – Administration Users, i.e. those authorised to access K8 WebTrade configuration options, are allowed to create messages that can show for all customers, or be targeted at individual accounts. The messages can also be set to expire after a certain time.
- **Static page editor** – The static page editor allows the creation of pages to be added to your K8 WebTrade site. Site navigation menus can also be created and managed by Administration Users.
- **Google Analytics Integration** – Integration with Google's Analytics package provides a view of data related to site performance, including traffic.

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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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