



## Web Builder - Key functionality Summarised

This document highlights the key features available within K8 Web Builder version 3.0.

This factsheet provides a summary of features available within K8 Web Builder. As a key component of the K8 suite, Web Builder 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).

### Web Builder Configuration Functions

- **Content Management and Web Page Creation editor** - Allows for the use of pre-built themes, amend, delete and change structure of pages and their content. Pages can be built from structured blocks containing text, images and html.
  - **Menu construction and navigation options** - Construct site navigation menus and create breadcrumb trails through multi-level category navigation. Site navigation menu options include standard two-tier menu bar, single column dropdown lists, mega menu, and category or links panels.
  - **Support for multiple websites** - to create Trade (B2B) and Direct Sales (B2C) channels choose between wide and shallow grid/array type display and graphical block type.
  - **Site Administration** - Manage downloads, product reviews, categories and site rules. Cross sell items may be maintained directly within Web Builder, to be offered within the basket build. The Search Engine Optimisation (SEO) function enables metadata maintenance. Product sequencing options can also be maintained.
  - **Login, Authentication and Account Administration** - Trade customer login details and credentials are maintained directly within K8.
  - **Product Catalogue Replication** - A means is provided to replicate summary product detail from K8 onto the Web Builder server, including a mechanism to define the mapping between the K8 product table and the categories to be used in Web Builder. An indicator to define a product as 'not yet available' for use on the web may also be maintained, which allows for content to be added prior to final publication.
- When replicating data, a product may belong to multiple categories within Web Builder and multiple images may be uploaded for each product.
- **Rich Content Bulk Upload tool** - Load images (options for more than one image per product), documentation and blocks of rich text or html as extra descriptive content.
  - **Meta-Data and Scripting** - Meta-data, CSS, and scripting at the head section, page body start, and page body end can be applied for all web pages via Site Administration functions and article entry functions.
  - **Flexible Forms and Browsers** - A number of forms and browses in the website can be customised, enabling different presentation and content for B2B, B2C and guest visitors.
  - **Mail Forms** - Custom questionnaire forms can be set up to collect customer data and can be added to any page in the website, and the data collected may be emailed to a list of email recipients.
  - **Image Slideshow** - Image slideshows can be set up and added to any page. Each slide may simply be a single specific image or a mixture of images, text and links. Slideshows can be set up for the category page to be context sensitive, changing slide content for each category.
  - **News Ticker** - A ticker control can be added to pages in the website to display scrolling or fade in/out article headlines with option to click on the message to redirect to the specific news article page.
  - **Follow Us Links** - Follow Us buttons to link to the website merchant's Facebook, Twitter, LinkedIn, YouTube, Google+ and Pinterest social media sites.
  - **Sharing Links** - Facebook Like and Twitter Tweet buttons can be added to pages to allow web customers to share the page with their friends on these social networks. There is also support for "ShareThis" which enables additional sharing buttons for many other social networks including LinkedIn, Pinterest, and Google+.

# Web Builder factsheet

- **User Security** - Various configuration options to control user security like configurable site customer password format; the password reset email to the customer may contain the new password, or a restricted link to site for customer to reset their password; optional restriction on multiple active sessions for each customer.
- **Separate Landing Pages for Trade and Cash Customers** - Where the website can be visited by both trade and cash customers, K8 Web Builder enables different content to be presented in the home landing page for these two types of customers.
- **Customisation and multi-language support for site text and messages** - Text strings and messages on the website can be customised or translated into another language (or locale).
- **301 Redirects from Old Site URLs** - K8 Web Builder has built in mechanism for handling permanent redirects from an old website, so that it will be an easy transition when migrating search engine ranking from an existing trading website to a Web Builder website. This feature allows Web Builder customers to switch off their old website by recognising the old website URLs and performing HTTP 301 redirects to the new Web Builder URLs to assist with retaining SEO ranking.
- **Automatic redirection for discontinued products** - K8 Web Builder provides an option to configure discontinued (obsolete) products which are no longer sold on the website to automatically redirect to another URL within the website instead of a File Not Found error page. The redirection may be to another product detail page, a category page or a custom page on the site, and may be set up as permanent or temporary redirection.
- **Automatic login following account registration** - Site visitors who registers online may be optionally logged in automatically after successful registration.
- **Articles and Blogs** - K8 Web Builder supports the ability to set up articles and groupings of articles in a hierarchical structure and allow these to be edited and published to produce blogs, forums, and FAQs, with the option for customers to post comments.
- **reCAPTCHA Support** - reCAPTCHA support helps to ensure that the user submitting the form is a real user, and to help prevent automated software from performing actions that degrades the quality of service provided by the website and by the back office system.
- **Descriptive URLs** - K8 Web Builder supports descriptive URLs which helps SEO ranking. In addition to providing a default set of URLs, the URLs can be customised.
- **Responsive Design** - A single website is optimised for any device (desktop, tablet, and mobile phone), using the Bootstrap, HTML, CSS, and JavaScript framework. K8 Web Builder enables using a mobile-first approach to ensure that the website is optimised for viewing on mobile phone devices as well as look good on desktop browsers.
- **Device detection** - K8 Web Builder supports server side device detection to support rendering decisions at the server end depending on whether the display browser is for a mobile phone, tablet, or desktop. Detection is through support for 51 Degrees Cloud.
- **Adaptive blocks** - Pages in K8 Web Builder are constructed from a set of blocks of various content type. Each block can be configured to not be rendered on specific devices to reduce the content rendered and sent to the client browser and improve rendering performance, particularly on mobile devices where network speed is typically slower.
- **Adaptive flexible browse columns** - Similar to Adaptive blocks, columns in flexible browses can be configured to not render on specific types of devices.
- **Responsive tables** - Browsers rendered using HTML table are optimised for multiple devices (smartphones, tablets and desktop PC's), offering either the option to allow the browse to be scrolled on small device screens, typically through swiping action, or to be stacked into a single column, with each cells of a table row rendered as a stacked column with cells of each row grouped.
- **Font-Awesome icons** - K8 Web Builder includes support for Font-Awesome, a set of scalable vector icons accessible through CSS classes which can be embedded on web pages to enhance the user experience. Other icon sets can also be used.
- **Product Tabs** - The product details page offers support for tabs with tab panels set up to present product data, which is particularly useful on mobile phone devices as it requires less vertical scrolling to see all the page content.
- **Downloads** - K8 Web Builder can support download of certain forms of media. These catalogues can be uploaded into Web Builder and be presented as a download option by placing a Download block on any page in the website.

## Trading Components and Functions

- **Product Search** - The search facility uses SQL Server full text indexing to perform partial match searching of product code, description and descriptors. A search based upon the manufacturer code is also supported. It is possible to customise the search to include any combination of these elements. If faceted navigation is in use, then implementation of Apache Solr is required to help deliver fast and efficient search results.
- **Stock Information in Real-time** - Display the current free stock position as defined in the main system. Configuration options exist to show (or not show) actual figures for the selected branch.
- **Customer Specific Pricing** - When a customer contact with valid login credentials is logged into the trading section of Web Builder, the 'price' displayed is the customer's price, as defined within K8. This could be the standard price, the customer's discount and the net price, all of which are available wherever prices are displayed, excluding the Quick Cart, which by design is meant for fast entry of product code and quantity.
- **B2C Trading** - Web Builder enables a previously unknown direct sales customer to register and create a personalised record (this is created as a contact within a nominated 'Cash Account in K8). On returning to the site, the customer can login, drill down through categories and search for products. Business logic within Web Builder ensures that such customers submit full payment as a part of submitting the order, which will not proceed until payment approval is received back from Secure Hosting.

- **Cart Management, Previous Orders, and Order Submission** - The customer may browse, add and remove products from the cart as well as amend quantities. If not completed, the content of the cart is recalled when the customer next logs on (subject to cache rules). The cart is specific to the individual customer contact logged in, not to the customer account. After each product is added to the cart, the option is available to proceed through to checkout and submit the order. Optionally, a new customer not logged in can build a basket, and then register, login, and retain the basket.
- **Quick Cart** - This is a streamlined entry screen for customers who know the product codes they wish to order, shortcutting the category drilldown / product search facilities. It is typically used by customers who are ordering from a printed catalogue or re-order list, who wish to key in an exact-match product code and the required quantity only
- **Buying Lists** - The content of the cart may be saved as a buying list which can be accessed or copied to the cart at a later stage. This is useful for creating a list of items that are regularly purchased. The customer may select such a buying list, or a previous order, and copy the contents to the cart, where it may be amended and progressed. All orders are re-priced at the checkout to ensure prices are up to date.
- **Delivery Charges** - The customer may select a delivery option and its associated charge to be added at checkout. These options are maintained within the website. A zero charge may be applied for a standard delivery if the total order exceeds a specified value. The threshold may be displayed with the basket value to encourage the customer to exceed the value and benefit from free delivery.
- **Delivery Charge Bandings** - Each delivery option may be configured to a set of prices, based on the value of the cart, to encourage the customer to exceed the value break and benefit from a cheaper delivery charge. It is also possible to set up different sets of price bandings for specific post code areas or country.
- **Delivery service exclusion dates and lead time** - The required date for each of your delivery services can be controlled by assigning Delivery Service calendars, which allows dates excluded from delivery, days of the week excluded from delivery, and lead times to be defined.
- **Collection** - Users may opt to collect from a branch or have the order delivered.
- **Credit Card Integration** - Web Builder provides infrastructure to support common card payment options and has integrated functionality to couple with the Secure Hosting and the PayPal Express Checkout web solutions, to provide secure online payment processing. Details of charges are available on request.
- **Order Acknowledgments** - On completing the order, Web Builder reports the order number back to the customer contact on the site. Order Acknowledgements, generated from within K8, can be configured to be emailed automatically to the customer contact placing the order.
- **Store Finder** - Store locations, with summary details and images of each store can be defined to enable customers to find the nearest store and see the location on a map. This provides support for customisable attribute data, using geolocation (if available) to show stores near the customer, as well as displaying all stores and stores by region.
- **One-Off Delivery Address** - A one-off delivery address may be specified for an order and, optionally, this can be saved as a regular delivery address against the customer account to be re-used for subsequent orders.
- **Branch Selection** - Customers may choose a branch to purchase from at login time instead of being restricted to the default customer branch. Branch can also be selected or changed within the website after login.
- **Customer Also Bought/Customer Also Viewed Products** - Display list of products also bought by customers who bought this product, and a list of products also viewed by customers who viewed this product.
- **Cross-sell/Up-sell Products** - Display a list of cross-sell (or up-sell) products for this product. These may be maintained within the site or via the bulk upload facility.
- **Alternative Products** - Display a list of alternative similar products for this product. Alternative products are defined within K8.
- **Product Listing** - Display a list of products in grid or list format, with options to customise the number displayed per page, and option to sort by featured product, product description, product code, and list price.
- **Postcode Lookup** - One-off delivery addresses may optionally be filled in automatically entry through postcode lookup. This requires an appropriate license to be purchased from AFD Software ([www.afd.co.uk](http://www.afd.co.uk)).
- **Category Product Search** - The category pages can extend the product search facility to limit the search to the current selected category and sub-categories.
- **Apache Solr Product Search** - K8 Web Builder supports the usage of the open-source technology, Apache Solr, as an alternative tool for providing product search. Apache Solr is high performance search server built using the Lucene core which specialised in full-text search and faceted search. Solr runs in a Jetty server which can be hosted on the web server or on a separate server. This needs to be considered when specifying the required K8 Web Builder infrastructure.
- **Faceted Navigation/Search Filtering** - K8 Web Builder offers faceted navigation (or search) in the category page and search results page to extend the category drilldown and product filtering capabilities. This requires Apache Solr to be enabled for the website.
- **Product Details Lookup through Attribute Selection** - Where product attributes have been defined, it is to choose another similar product which only differs by attribute to change the product page displayed and the content (i.e. different images and descriptions).
- **Product Specification List** - Where product attributes have been defined, K8 Web Builder can display the product attribute data as a specification list in the product details page.
- **Quantity Break Prices and Discounts** - K8 Web Builder supports the display of quantity and value break prices and discount percentages from K8 in the Product Details Page.
- **Dynamic Category Breadcrumb Trail** - The category breadcrumb trail (or sitemap path), can display a drop-down menu of sub-categories at each category node to enable a site visitor to navigate through the category hierarchy.

## K8 Summary factsheet

- **Product Search Suggestion** - K8 Web Builder can display product search suggestions as the site visitor types a search term into the website's search box, and one of these can be selected to navigate to the relevant product details page immediately.
- **Google E-Commerce Tracking Support** - K8 Web Builder has built-in support for generating Google Analytics Page Tracking and E-Commerce Tracking data using Universal Analytics (analytics.js).
- **Read and Agree Checkbox in the Checkout** - A 'read and agree' checkbox can be displayed in the checkout page which prevents the customer from submitting the order or proceed with card payment, until he or she has read a notice and clicked on the read and agree checkbox.
- **Quick Cart upload from spreadsheet** - K8 Web Builder can upload a list of product codes, quantities, and optionally, unit of measure into the cart, from an Excel spreadsheet or a CSV delimited text file.
- **Guest checkout** - Guest customers can navigate and browse the catalogue not logged in, build a basket, and proceed to the checkout without registration or signing in; supply their email address and a delivery address in addition to the normal B2C customer checkout dialogue, and pay for their order by credit or debit card.
- **Extended order comments** - Delivery instructions (order comments) can be entered in the checkout page when placing an order.
- **Sales Quotation Enquiry** - A summary display of live sales quotation detail retrieved from K8 is available.
- **Invoice and Credit Note Document Enquiry** - A display of invoice and credit note documents, retrieved from K8, with the ability to do some simple filtering. The user can view the printed document in a new browser tab or produce a printed copy.
- **POD and Advice Note Document Enquiry** - A display of Proof Delivery and Advice Note documents, retrieved from K8, is available. The user can view the printed document in a new browser tab or produce a printed copy (if KPrint document management is present).
- **Statement Document Enquiry** - A display of account statement documents, retrieved from K8, with the ability to do some simple filtering. The user can view the printed document in a new browser tab or produce a printed copy.

### Customer Self-Maintenance Functions

- **Delivery Addresses** - Update existing delivery addresses.
- **Password Change** - Change website login password.
- **Payment in My Accounts** - Make account payments in the My Accounts section of the website to pay the whole or partial account balance.

### Customer Self Service Functions

- **Account Enquiry** - A display of summary Invoice / Credit Note information with the ability to retrieve an invoice from K8 (if KPrint document management is present), paging, filtering by date range, search by key word in invoice reference fields, and drill down to order detail.
- **Order Enquiry** - A summary display of order information, retrieved from K8, with the ability to filter orders from the last individual 12 months, last 3 months, last 6 months, or user-definable date range is available. Support is provided for paging, and by key word in customer order reference. The user can select an order and drill down to the order line detail, print a copy of the acknowledgement (if KPrint document management is present) and add the products on the order to the cart.

#### About Kerridge Commercial Systems (KCS)

We provide specialist software, services and support to deliver fully integrated trading and business management solutions to distributive trades customers, large and small – wherever they are in the world. Immersed in the distributive trades for over 35 years, our technical experts are thought leaders in trading and management technology, and our innovative and flexible approach ensures our customers partner with us for the long-term.

Our mission is simple: to design and deliver high performance, integrated ERP solutions that enable our distributive trade customers to source effectively, stock efficiently, sell profitably and service competitively.

#### Contact KCS

UK +44 (0) 1488 662 000

Ireland +353 (0)1 469 3375

K8info@kerridgecs.com

www.kerridgecs.com