K8 Summary Factsheet

Kerridge Commercial Systems

K8 WebPro - Key Functionality Summarised

K8 WebPro – This document summarises the key functionality available within the K8 WebPro application (app).

Introduction

K8 WebPro is a cloud-based solution, available on a subscription basis. As a component of the K8 suite, K8 WebPro is pre-integrated with K8 in a number of areas. This enables a K8 user to create an online trading capability for new and existing customers, including those who have an existing trade account, and consumers who do not yet have an account with the business. Note that whilst all of the features below may be implemented, there may be instances where site rules and configuration may disable optional features (for example, to disable the display of prices to a website visitors, user security settings or implementing an option where a choice of operation is available).

- **Web order creation - Trade customers** – A trade customer will log onto K8 WebPro 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.

  Once logged onto K8 WebPro, a customer may search for products using a text search facility or may browse through the product hierarchy to find a specific product. Customer prices and stock availability are retrieved from the K8 system and are shown on site for the products displayed.

  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 WebPro once it has been submitted to K8.
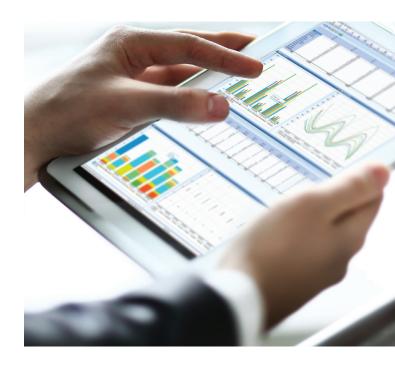
  Click and collect delivery options - indicate which customers can collect their order from your branch.

- **Web order creation - consumer** – A consumer (an individual who does not have an account with the business) will access the K8 WebPro site but will not log in.

  Once on the K8 WebPro site, a customer may search for products using a text search facility, or may browse through the product hierarchy to find a specific product.

  Pricing details for the product will be retrieved from the K8 system for the products displayed. 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 consumer will be asked to register their personal details, including the delivery address. They may also choose the delivery method for the order from the defined list. Once satisfied, the customer may then proceed to pay for the order – this payment is processed via the chosen payment provider's secure gateway (additional licence required). Once paid, the order and associated payment will be imported into K8. The sales order will be created on the nominated cash account. Note that no further amendments may be made to the order within K8 WebPro once it has been submitted to K8.

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Site configuration options

- **Home page** – The home page of the K8 WebPro 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 creation** – Product details are exported from K8 in to the site on a nightly basis. This will include base details such as description, product code, product image and retail price.

- **Analytics dashboard** – A built-in sales dashboard allows for sales values captured within K8 WebPro 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 WebPro 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 WebPro site. Site navigation menus can also be created and managed by administration users.

- **Google Analytics integration** – Optional integration with Google's Analytics package provides a view of data related to site performance, including traffic.

- **Delivery charges** – Delivery charges can be set by region, UK postcodes can be included or excluded as required. It is also
- possible to set minimum charge/weight that can be applied to a specific day of the week. Products can be included or excluded from delivery charges based on product code or product category i.e. if a product contains hazardous materials therefore attracts a special delivery charge.

- **Promotions** – Multiple promotions can be applied to an order. Promotional discounts can be based on specified values or calculated as a percentage of the sell price. It is possible to set a promotion that enables a customer to receive a discount on the sell price of one product based upon the purchase of another. This discount can be specified as a fixed value or calculated as a percentage of the sell price of that product. Promotions can also require the entry of a voucher reference in order to apply. These promotions can be created in advance to take effect between specified date ranges.

Trade customer features

A trade customer may also view details of their account, retrieved from K8 on demand. These include:

- **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 from the order to their 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. The 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, and may make a payment on their account, using the secure payment gateway (additional licence required). Once the payment has been successfully concluded, details are imported into the K8 system. 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.

Contact Kerridge Commercial Systems

UK +44 (0) 1488 662000 | Ireland +353 (0)1 469 3375 | K8info@kerridgecs.com | www.kerridgecs.com

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