



## 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 SaaS basis. As part of the K8 suite, K8 WebPro is pre-configured with K8. This enables a K8 user to create an online trading capability for new and existing customers, including:

- Those who have an existing trade account
- Consumers who do not yet have an account with the business

Note that while all the features below may be implemented, there may be instances where site rules and configuration may disable optional features. For example:

- Disabling the display of prices to a website visitor
- User security settings
- Implementing an option where a choice of operation is available

**Trade customers** – A trade customer will log onto K8 WebPro using their email and password, which will associate them with their K8 account. This ensures that all pricing and stock details for selected product/account combination are retrieved from K8 and displayed throughout the site in real-time.

A trade user has access to the following self-service account options:

- View aged debt
- Browse invoices by period
- Search for invoices
- Download PDF documents of invoices
- Pay off account using a payment service

**Consumers** – Consumers can access K8 WebPro and browse the site without a user login, allowing them to view and add products to their basket before continuing with the purchase. K8 WebPro allows the addition of auxiliary information such as news articles, Q&As, promotions and banners.

**Web order creation** – Trade and consumer users can browse the site and find products by:

- Search for products using a text search with look ahead functionality, including automatic fuzzy logic and pluralisation using Elasticsearch
- Browse by brand or the product hierarchy to find a specific product
- Browse by badge (e.g. New to Range products, set up using the K8 WebPro CMS)



# K8 Summary factsheet

## Users can then:

- View products and additional information like technical details, documents and multi-media
- Add to their wishlist, if logged in, or choose between Delivery and Click and Collect for purchase
- Proceed to checkout once they have added the required products where stock and price are checked in real-time, ensuring the trade customer or consumer is getting up to date information
- Save their basket for later use, or continue to checkout

## At checkout, the customer can:

- For consumer or cash customers, add or use a billing address
- Add a delivery address for delivery orders, trade users can be configured to only use addresses stored against their account in K8
- Add an order reference
- For delivery orders, choose a delivery charge from a potential list of services
- If they are a cash customer, they will be required to pay for their order

Once satisfied, the customer may submit the order, which will automatically create a sales order within K8, which can go straight to pick or suspended status.

**Note: No further amendments may be made to the order within K8 WebPro once it has been submitted to K8.**

## Site configuration options

**Home page** – The K8 WebPro homepage is customizable, allowing you to add rich text (including multimedia), featured products, categories, badges, and banners.

**Banner Management** – Banners can be added or changed directly on the front end of the website or through the CMS. Some banners are customizable, while others are static images. These banners can link to any part of the site, cater to either consumer or trade customers, and be restricted by date range to allow for self-publishing when active.

**Product creation** – All product details are imported from K8 into the site nightly. This includes product information, prices, stock levels, descriptions, units, product hierarchy, alternates, cross-references, and related products.

**Analytics dashboard** – The built-in sales dashboard in K8 WebPro allows you to view captured sales values. You can see daily and weekly sales figures, as well as those from previous months.

**Admin messages** – Administration users, authorized to access K8 WebPro configuration options, can create messages visible to all customers or targeted at individual accounts. These messages can also be set to expire after a specified time.

**Static page editor** – The static page editor enables the creation of pages for your K8 WebPro site. Administration users can also link these pages to menus in the CMS. These pages can be restricted to trade users and set with date ranges to allow for advance creation and automatic publishing.

**Menu editor** – The menu editor in the CMS allows users to add any page or external link to K8 WebPro. These links will only appear if the URL is valid, meaning unpublished pages can be added to the menu ahead of time and will not appear until the pages are published.

**Google Analytics integration** – Optional integration with Google's Analytics package offers insights into site performance, including traffic data.

**Delivery charges** – Delivery charges can be set by region. Minimum charges or weights can be applied, and specific days of the week, allowing for chained charges. Products can be included or excluded from delivery charges based on product code or category, such as hazardous materials that require special delivery charges. Individual services can also be set up for Standard or Express Delivery.

**Branches and Dealers** – Branches for Click and Collect, as well as Dealers for associated businesses, can be set up in the CMS and displayed on the front end. Users can find locations by postcode and view branch details, including a map, address, and opening times.

**Click and Collect** – Users can search for the nearest five branches using their postcode and view current stock levels at each location when adding a product to their basket. This includes a map, address, and opening hours, giving users confidence that the product will be available. The stock messaging is customizable, allowing the site to be tailored to how the business handles Click and Collect. The basket will always display the stock level of the branch when in Click and Collect mode.

**Reviews** – Logged-in customers can leave reviews for products and select up to three individual star ratings. These ratings are embedded in the page and can be picked up by Google for use in its search results if deemed appropriate.

**Promotions** – Multiple promotion types are available including percentage discounts on the basket. These promotions can be restricted by user, spend, product range, individual products, date range, user type, or voucher codes. Multiple promotions can apply to a single basket, or a single promotion can override all others that would otherwise apply.

## Logged in user features

**My Orders view** – Once the order has been submitted, users can access the order via the 'My Orders' menu item. They may also opt to reload that order into their basket and purchase all the items again.

**Saved Baskets** – Users can view a saved basket, add individual products, or reload a full saved basket into their current basket.

**Wish Lists** – Users can view a wish list, modify quantities and delete products from their wish list. Users can also add individual products or reload a full wish list into their current basket.

**My Details** – The My Details section allows users to update their information, such as password, email address, and saved addresses. Trade users can also view the addresses stored against their account in K8.

## Trade customer features

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

### These include:

**Order Tracking** – Once an order has been submitted, users can view the status of each order line, such as whether items are out for delivery or on back order. These statuses are updated live from K8, and any modifications to orders since being placed will be reflected in the order view.

**My Account** – The My Account section allows credit account users to see their account balance, available credit, last payment date and last payment value. It allows customers to pay off their account using the payment gateways enabled on the site, as well as their account statement (aged debt), which is broken down by the last six months. Users can click on the period to view the outstanding invoices and download a copy invoice PDF directly from K8.

## Autocat integration for the SA market

WebPro integrates with Autocat to offer an electronic parts catalogue that consolidates automotive components from multiple suppliers into a consistent format.

**Vehicle Lookup** – Users can look up their vehicle using a make and model hierarchy or by entering the VIN number.

**Industry Standard Data** – Autocat integrates with the TecAlliance parts catalogue. Once a user selects a vehicle, only relevant products for the selected product group are displayed. For trade users, real-time prices and stock levels are shown throughout the site.

**Technical Details** – When viewing products, the technical details provided by Autocat are shown live. This means that any updates made by the supplier are immediately reflected on the website, including product imagery.

**Product Filtering** – Results can be filtered based on specific criteria, such as fitting position.

**Fitting Notice** – If a user finds a part via the product search, it will be checked against Autocat to verify fitment with the current vehicle. If the part does not fit, a warning message will prompt the user to check the fitment before purchasing. If the part fits the current vehicle, this will be confirmed.

**Supplier Preferences** – Autocat will only return parts that match the suppliers enabled on the customer's Autocat account. These parts can be grouped using alternative products populated in K8, allowing similar products to appear together and promoting premium brands.

**Previously Looked Up Vehicles** – If a user is logged in, they can view previously selected vehicles, allowing them to switch between them.

K8-WEBPRO-FACT/ SA 01-20-06-25

## 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 40 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.

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