



WebPro for K8 Trader - Key Functionality Summarised

The purpose of this document is to summarise the features available within WebPro for K8 Trader.

Introduction

WebPro is a cloud-based solution that allows for cash customers of the business to shop online and is available on a subscription basis. As a component of the K8 Trader suite, WebPro is pre-integrated with K8 Trader as outlined below.

Overview

A business using K8 Trader can create an online trading capability for a cash customer, or consumer, hereafter referred to as a customer. Note that the ability to trade online for customers who operate credit accounts with the business is not available within WebPro. Note also that whilst all of the features below may be implemented, there may be instances where site rules and configuration may disable optional features.

For further information on K8 Trader, please refer to the K8 Trader Factsheet.

Data will be transferred between K8 Trader and WebPro, as outlined in this document. In addition, data creation and edits may also be undertaken directly within WebPro. These are described below.

A daily export facility for stock quantities from K8 Trader to WebPro is available and it is recommended that this should be actioned at least daily. This process can be automated via a scheduled SFTP CSV file transfer job.

Live interfaces between WebPro and K8 Trader are available for retrieval and display of product price and available stock. In addition, sales orders are transferred from WebPro to K8 Trader once complete and confirmed. These features are described below.

Actions

Web order creation – A customer will access the WebPro site but will not necessarily log in. Once on the WebPro site, the customer may search for products using a text search facility or may browse through the defined product hierarchy to find a specific product. Additionally, pricing and stock availability details for the product will be displayed. This data will have been populated via the daily export from K8 Trader outlined above.

The customer may add the chosen product to their basket. This action may be repeated for other products as required. Once the customer elects to view the basket, a live call will be made to K8 Trader to validate and display the selected products' prices and stock availability as now recorded within K8 Trader. Any changes from the originally imported daily export values will be updated and the customer informed via an on-screen message that these have been updated within the basket.

Once the customer is ready to finalise the basket, they can select the Paypal checkout to finalise payment. The customer will be redirected to the Paypal site to approve their order payment and then will be redirected in turn to Webpro in turn to finalise and pay. In this instance, the customer address detail is populated from the details held within Paypal and is utilised for the billing and address information on the order.

Once paid in full and confirmed, the order will be posted electronically to K8 Trader. No payment information is currently included within the transaction posted, however only orders paid in full will be transmitted from Webpro to K8 Trader upon completion. The resultant sales order will be created within K8 Trader and will be posted onto the nominated cash account.

User profile creation – A customer may select the option to register for their own cash account. Utilising this option, the customer will provide the following details: title, first name, surname, telephone (optional), email and password. Once completed, they may sign in as a registered user, where they will now have the following additional options:

- They may reload previously saved baskets
- They may view their completed orders
- They may create and maintain their own product wish lists.

Summary Factsheet

Site configuration options

Home page – The home page of the 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.

Categories – Products can be categorised and grouped into multi-level categories. These categories can be created via an import process from K8 Trader utilising the department structure (major-minor departments). Please note the system setting to link them must be active in order to utilise this feature.

Alternatively, the site admin user may create the categories and assign products to specified categories. Site configurations can be used to hide categories created via the import process, and these will not be overwritten.

- **Product creation** – Product details are imported into the site from a CSV or suitably formatted file as outlined above. This will include base details such as description, product code, product image and retail price.
- **Analytics dashboard** – The in-built sales dashboard allows for sales values captured within WebPro to be viewed. Daily and weekly sales values are displayed, as are those from previous months.
- **Admin messages** – Administration users, i.e. those authorised to access 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 within the site by region, and postcodes can be included or excluded as required. It is also possible to set a 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 and 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 selling price. It is possible to set a promotion that enables a customer to receive a discount on the selling 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 selling price of that product. Promotions can also require the entry of a voucher reference in order to apply. These promotions can be created within the site in advance of the effective date to take effect between specified date ranges.

WEBPRO-K8-TRADER-FACT/01-12-09-22

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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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