K8 Sales Portal

Kerridge
Commercial Systems

K8 Sales Portal - capturing customer orders with ease.

Introducing an easy to use and quick to deploy, web-based product that will allow your field sales team to take orders while engaging with their customers.

The K8 Sales Portal doesn't rely on an in-depth knowledge of the core K8 system, but rather has been designed for occasional users to capture and process orders easily, quickly and efficiently within K8.

K8 Sales Portal can be used on a smartphone or tablet, and works across the Internet. There is no direct connection required to your K8 system. It's the perfect solution to enable your sales team to not only maintain contact, but also continue to trade with their customers while observing the social distancing rules and other safety measures.

Core features:

- Secure Login
- Customer Lookup
- Inventory and Pricing
- MySales
- Capturing Sales Orders

K8 Sales Portal - enabling your sales team to place orders online for their customers.

K8

K8 Sales Portal Key features:

Secure Login – All logins to the K8 Sales Portal are secured and validated against the users credentials in K8. Authorized users can log onto the portal and have immediate access to the customers, product and stock information together with high-level sales metrics.

Customer Lookup – Finding a customer record is as easy as if they were searching directly within K8. They can use a standard word search, a partial customer name, address or zipcode. All matching records are then displayed and the user can select the correct one. Buttons then enable them to call the customer or to send an email. They can also view and select other contacts associated with the account. As soon as they've found the right customer it's a simple task to place the order.
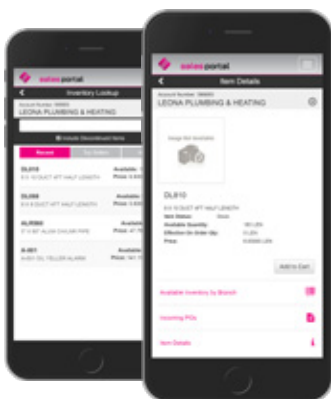
Inventory and Pricing – Once logged in, the user can find a product using the standard search facility and view summary stock details. When a customer record is selected, they can also view customer pricing for the products, items recently purchased by the customer - as well as top sellers - and it's easy to add these to the basket before proceeding to purchase. Once a product has been selected, the user can also view the current stock availability at any branch, as well as seeing what non-reserved stock is due in on purchase orders.
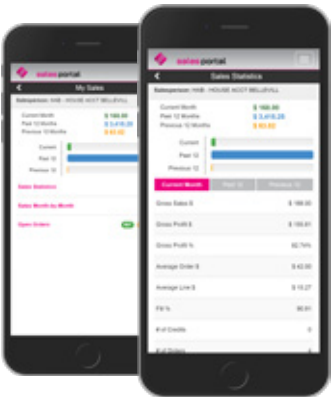
MySales – this allows the user to view their top-level sales metrics, such as sales performance for the period to date, for the previous 12 periods and the prior year comparison. They also have access to average order value and number of lines, as well as summary totals for credits raised. They can drill into order detail and also view open invoice detail - all with easy selection. Once an order or invoice is selected, the user can elect to re-send the appropriate acknowledgement or invoice via email. They can also copy the content of these transactions to the basket to re-order.

The snapshot of the account is a very useful view for the sales team, keeping them informed and allowing them to spot trends and query performance.

Capturing sales orders – Raising sales orders on behalf of customers is a simple process. Once the relevant account has been selected, they can then browse the product catalog online. Product details are retrieved from K8 directly, including customer specific prices and actual inventory availability. Your staff can keep the customer informed as they are processing the transaction. Product images can also be retrieved from K8 and displayed on the device. Standard products and bundled kits may be ordered online as complete products, while tally products will continue to be ordered directly from the branch.

As the order is being built up, details are added to the basket in K8. When the user completes the order, it is created within K8 and is ready for onward shipment.

K8 Sales Portal - driving greater efficiencies into your business and delivering enhanced customer services.

working in partnership.

K8 eLearning – Quality product training delivered online for you

Comprehensive product training delivered to you when you need it and at a time that suits you.

We know that ongoing training improves user confidence and efficiency and is vital if to ensure that you continue to get the best return on your investment in K8. We also understand how busy you are and how difficult it can be to free up time for staff to attend classroom–based courses, or to dedicate specific days to on-site training.

K8 e-Learning is designed to address these challenges – delivering training courses over the internet, it takes the classroom to you.

Not only that, you can also choose the time that best suits and you dictate the pace at which you work through the course.

With a wide selection of standard courses across a broad range of business functions, you can choose which courses best suit your needs. These courses are ideal for businesses who have taken on new staff, have staff who have changed roles, for those expanding their responsibilities or just need a quick refresher course.

Courses are designed by our subject matter experts to ensure customers gain maximum benefit. Combining both video for the standard processes, with written material and exercises, users can learn at their own pace and when it's most convenient to them.

Key Benefits

- It delivers a flexible approach to training on-demand

- It enables customers to choose from a range of standard courses to meet their specific needs

- It allows users to access training material at a time that best suits them

- It provides an effective training program, with courses tailored for specific roles

- It contains a range of tests to challenge users' understanding and to ensure they really benefit from the material

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 utilization, together with real-time information for management decision making.

Contact Kerridge Commercial Systems

US +1 919-379-3800 | www.kerridgecsna.com | info@kerridgecsna.com

ORACLE Gold Partner