Kadra Website Outline

Sign Up

Website Speed Should Be Extremely Quick

It should open to my Dashboard

When entering the website there should be a pop up with the login or Register.

Log in Goes directly to the front page of the website.

Register goes to page to add information

* Name
* Company Name
* Company Billing Address
* Company Shipping Address
* Email
* Phone

All Above Required

* Tax ID = not required
* Business Type = should have a dropdown with the 10 lines they may be part of

Salesperson Should be able to create a New username and Password for customer to be able to send it to them so they don’t have to sign up.

Customers Should have their custom Portal Which includes notes and Custom Prices.

Administrators salespeople and warehouse should have their own log in to be able to see all customer portals, Based on the needs.

Once Registered A notification should be sent to the office and should be able to be sent to multiple Email Addresses.

Click off of email to approve.

If approved by someone else then and someone else hits approved it lets them know that it was already approved

Use cookies so salesperson doesn’t loose his order

Approval

Should be easily able to approve customer,

Should be able to assign a Net 30, Net 45, Net 60, Or COD.

Net 30,45,60. Customers should not be stopped before they checkout.

COD customers Should be Required before Checkout to have to enter a CC.

Should have a plugin or something to make sure that CC is Valid.

Should have our processor connected for COD customers. Will charge the customer once the invoice is created. If it goes through it can be shipped. If not a notification should be sent to A few email addresses to not ship the order and a email to the customer notifying them that their CC was declined and to please provide a new one before we Ship.

COD Customer when Putting in CC it should save it to the customer notes for future use

Product information

* Custom Prices Per customer.
* Certain Products should be locked and only certain customers can See and order
* Should be able to have Categories, Sub Categories, And sub sub Categories
* Should be able to order directly off of the Front page= Meaning not have to first go into the page
* Shop By Brand
* Shop By type of Store includes

Bar

Houseware/Hardware Retail

Caterers

Restaurants

Gift Stores

Bakery

Event Planners

In order of catalog

It Should have an amazing Search= Major priority

* Should know all symbols abbreviations
* Should have a dropdown to choose from including a image

Filters

Default filter should be in order of catalog

* Brand
* Size = depends on the category it should know what size we are referring to for example glass it should do oz, cookware Qt, Knives, Inches
* Color
* By Catalog

All Images Should automatically resize to the same size

Should continuously scroll down and not have to click for next page if it works quick otherwise it should have 200 Per page

Should be able to Scroll to the next image from the front page as we want to have infographic pictures

Should be able to have up to 12 Images

Should be easily able to change all product information manually and through Excel Sheet

General Product information

* Brand
* Description
* SKU
* Case Pack
* UPC
* Price
* If there is a Size should add size
* If there is a color it should show the Color

Should be able to add custom information for example

* In Stock, Coming in In May, Out Of Stock, Liquidation
* Or on Glassware Top dimension
* Bottom Dimension
* How many Pieces come in a Unit 1 pc or 6 Pc

Shipping Dimensions

* Weight
* Length
* Width
* Hight

When Clicking into the product you should be able to zoom with the image staying clear

Should be able to have a description on the product

Customer should only be able to add to cart by case pack

However, Salesperson Should be able to override it by manually entering different amount

When returning to previous page from a product you should come back to where you were holding not jump back to the top of the page

Adding Products to Cart

Option When Buying QTY it should be able to have a better Price

Should have Related products show up

Salesperson Should be able to give discount by percent

When adding a product to the cart A popup should show up on the page that it was added to cart in green and should stay there for about 2 sec.

Once a product is added to cart the add to cart button should change to say that it is added to cart, so if he scrolls further and wants to check if he added it he will see right away without going to the cart.

If they want to change the amount once it is in the cart they should just be able to add it through the dropdown without having to click again add to cart and it will update the cart.

? instead of a remove from Cart maybe we should put something like save for later?

Once they are ready for checkout it should come up suggested items based on what’s in the cart.

Catalog

Should be able to create custom Digital Catalogs based on certain criteria.

For example if we put together a list for Bars or Caterers the sales person can create a digital catalog for them or if we want to create a custom proposal but want to show It in Digital PDF catalog format we should be able to do that.

As well customer should be able to select certain pictures and create his own digital PDF Catalog as next time the sales person is there they can show it to them or to their customers.

If possible, our high-resolution Pictures should be locked so that another ppl can’t take them. We should have to authorize their account to be able to download high resolution pictures.

If we update the catalog and add a product let’s say before product 67 all products should automatically move up a number.

Shhould be able to send Mass Email to Customers Based on the Category

Every customer should have a primary assigned salesperson

History and order By history

We should be able to upload old invoices or invoices that didn’t come through the website so that we can add them to the reports.

All invoices should get saved.

Customer and salesperson should be able to run extensive reports.

Be able to order off of a all Products ordered in the past and should show QtY

* Customer should be able to run reports and filter it by Date time frame, all invoices in that time frame should come up it should come up in invoice format including a smaller picture.
* Customer should be able to add to cart directly from the past invoices once it is added if if the same product is on a different invoice in this time frame it should come up added to cart and the amount, they added should also come up like this they don’t by mistake order the product twice.
* If they do want to add more they should be able to adjust it on any one and it will update on all.
* An additional column should come up showing during this time frame the total they ordered of this item.
* Customers should be able to download these reports to excel.
* Price shown should be New price we have to figure it out.

Sales person should be able to expand the report and have an additional columns showing per order in this period the qty ordered.

Checkout

Once customer checks out a popup should jump up to confirm his Shipping address. Add a custom notification.

If custom notification is added an email should be sent to multiple emails with the information that is in the notes.

Once he confirms the order a sales order is created and a PDF and Excel with the product information is sent to him.

A email is sent to Multiple email addresses to confirm. Once confirmed a picklist is sent to Multiple email addresses.

Sales Order includes

* Small Image
* SKU
* Description = should be able to choose which extra information should be added for example size color case pack
* QTY
* Price
* Case Pack
* UPC Code
* Percent discount

Excel should also have all this information and if possible including the images.

All product information Should be able to be Exported

Pick list Includes

* Image
* SKU
* Description
* QTY
* UPC
* Bin Location

Once a order is picked Should be able to update on the pick list what was picked and what was B/O Whatever was picked will create a Invoice.

Once invoiced it should automatically send a invoice and a Pick list in a PDF to the customer as well as multiple Email accounts

This Pick list should be without bin Locations

Email should say that their order is packed and ready to ship you will be notified once it was shipped.

Once shipped it should have a location to press ship and the customer will receive a notification that his order has shipped.

Create Shipping Labels

Should be able to filter contacts and stores by Type location, or tag

Limitations = be able to block certain things from certain customers

If items are in cart it should send a email the next day to check out.

Should have by checkout a notification of how much left to their free shipping

If any information will be lost by either going out or back or when loosing internet, or under a product change in order to either save or loose information it should have a popup that I have to press that I want to confirm the changes and my items may be lost

Shoud be mobile friendly as well very Ipad Friendly

On Mobile should be able to have list view otr grid view

On the invoice it should say due in 5 days or past due with the amount of days

After every checkout should get a email teling us the amount and past due amount the customer owes us

Should be able to lock orders once they checkout the warehouse doesn’t see it.

It should come up on the dashboard a list of locked orders

Disscuss with CC processor to create hold

Should have these balls like trade gecko so that you can keep up with the orders

If a product is B/O it should create a new sales order that is a Draft with the products that are B/O and Should Be sent By PDF to multiple Email addresses.

A B/O report should be Able to be made

Credit notes should be able to be given

Shipping setting by amount and by state should be able to be created

As well updating invoices and pushing them through to QuickBooks and reverse once paid.

Salesperson should have it cloned so if there is no internet he can still take the order.

Salesperson cart should only enter the customer’s account once it is finalized.

Create a statement.

Should link with qb.

User permissions

Admin = everything

Salesperson= only customers assigned to him

Warehouse = can’t view prices

Warehouse admin= can view prices but not buy prices

Should be able to set Default emails that get all notifications.

Import stock information so salesperson can see stock.

As well as once a item is back in stock if this item is on a B/O it should send notification to multiple emails that this item can be fulfilled.