

The SMART Supplier Portal is where you can maintain and update your catalogue online so that customers using SMART have up to date prices and products.

Logging In

Once you have a SMART Supplier Portal account you will be sent an email. This will have a link to your login page and your username and password. Simply click on the link and you will be directed to a login page as shown:

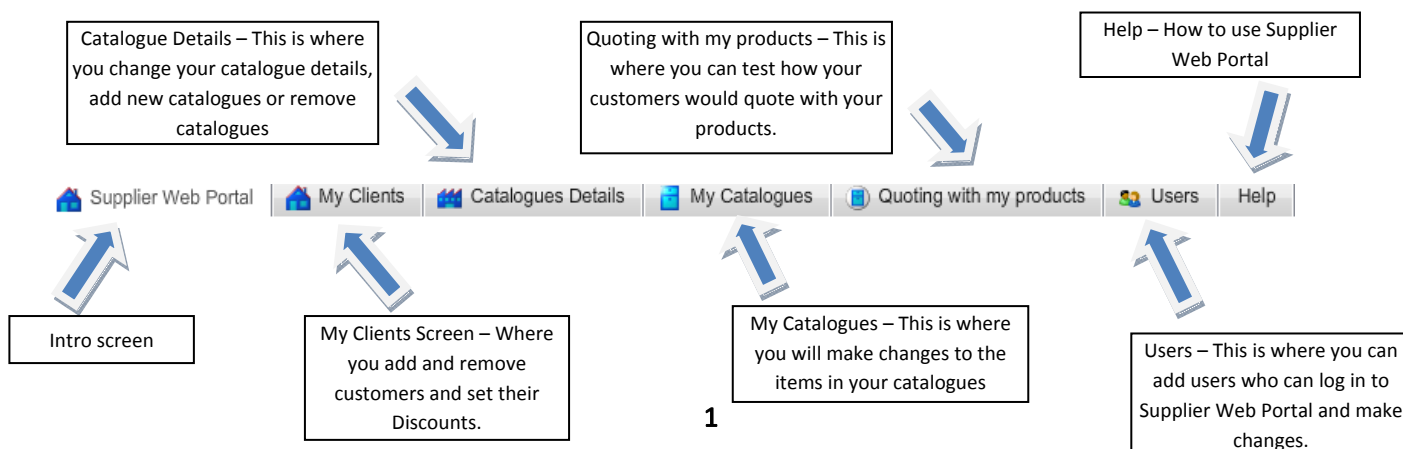


Copy and paste the username and password you are given into the relevant boxes; check save password if you would like to avoid having to do this every time and click login.

Tip: You may want to bookmark this page in your browser to avoid having to locate the email each time.

SMART Supplier Portal Layout

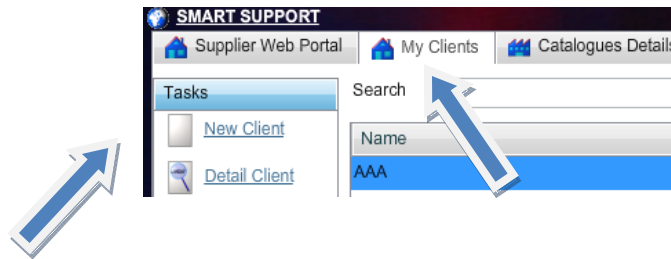
Once you have logged into SMART Supplier Portal you should see the tabs at the top of the screen, these are used for navigating around the supplier portal. They should appear like this:



Creating a client

To enable a customer to order products from you using KBB Connect you will want to add them as a client in your supplier portal.

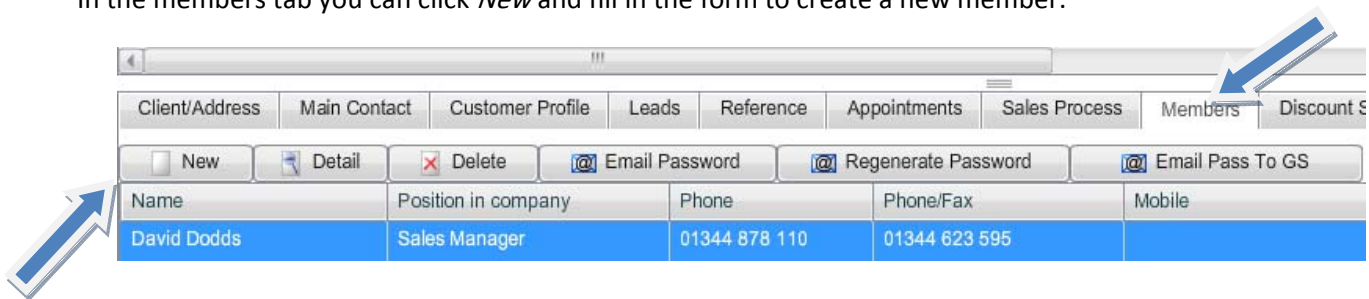
Click *My Clients* from the top of the Supplier Portal and select *New Client* from the menu. A form will appear, fill in the information requested. If you do not know certain bits of information leave it blank as it can be filled in later.



Adding members to a client

In order for clients to use the KBB Connect you will need to add members to the client so that they can log in.

To create a new member simply click on the customer in the *My Clients* screen and click on the members tab. In the members tab you can click *New* and fill in the form to create a new member.



Once you have created that customer you will need to email them a randomly generated password so that they can access KBB Connect. To do this highlight the person in members and click *email password*. This will email them a link to their login page along with a user name and password, they can use this to log in and they will be able to order products from you.

You will notice two other email related buttons, *regenerate password* and *Email Pass To GS*. *Regenerate password* is used if the customer forgets their password to reset their password to a random one. *Email Pass To GS* emails us the user's password and is used for trouble shooting purposes.

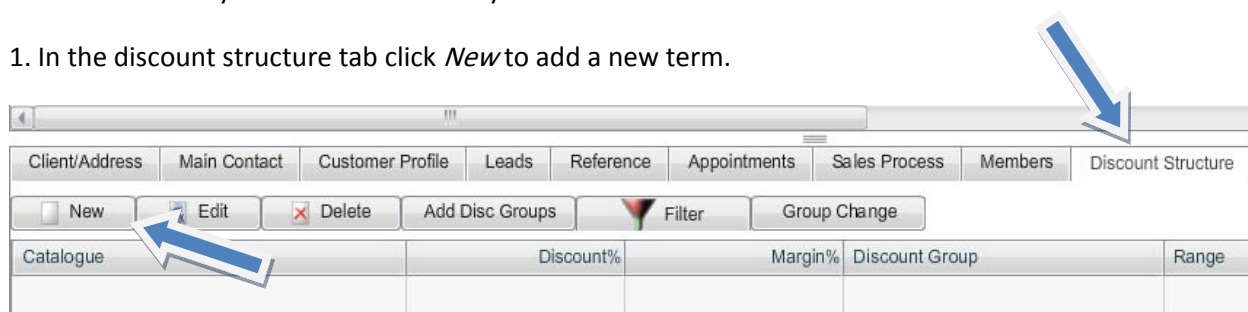
Setting up discounts for a specific customer

You may give different terms to different customers for this you will need to set their discounts up in the *My Clients* section of SMART.

Click the *My Clients* tab at the top of SMART to open the clients section. Select the customer you wish to change the terms for and click the *discount structure* tab at the bottom of the screen (if you do not see the tabs at the bottom of the screen click detail from the menu on the left).

There are two ways to set Discounts for your customers.

1. In the discount structure tab click *New* to add a new term.



After clicking new you will be presented with the following form:

New Discount Structure

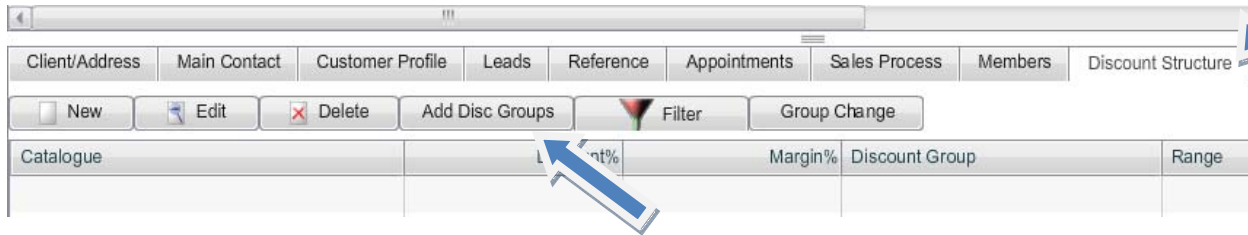
Detail

Catalogue	Generic Doors
Discount%	<input type="text"/>
Margin%	<input type="text"/>
Discount Group	ALL
Range	Quote 1

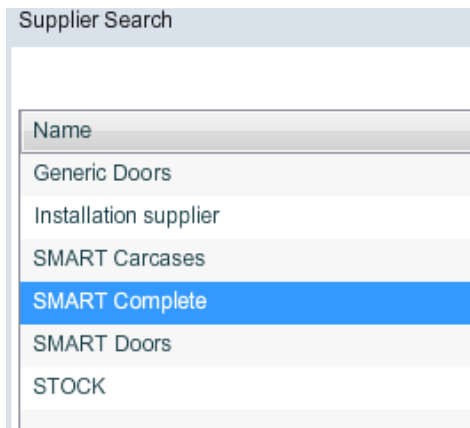
Select the supplier you wish to give the discount for and enter the discount %. Select a group of products the discount applies to or leave it set to 'ALL'. If the discount applies to a particular range select the range otherwise leave it set to 'ALL'. When you are done click save and next time the customer quotes with your products your discount will be in effect.

Please Note: Margin% will be set by your customer.

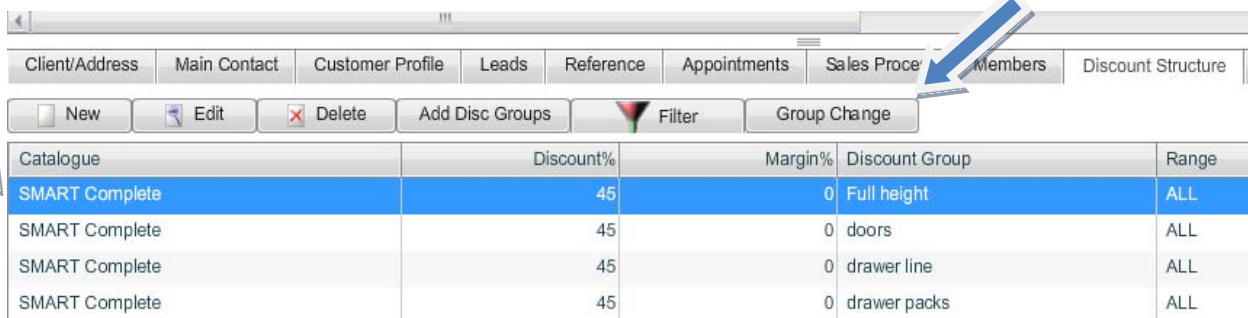
2. In the discount structure tab click *Add Disc Groups* to add all discount groups for the selected catalogue.



After clicking *Add Disc Groups* you will be presented with the following form where you choose catalogue and press Select:



This will populate all the discount groups below for selected supplier. Click on *Group Change* and in *Value* specify customer discount for all the groups or manually change discount for every group.

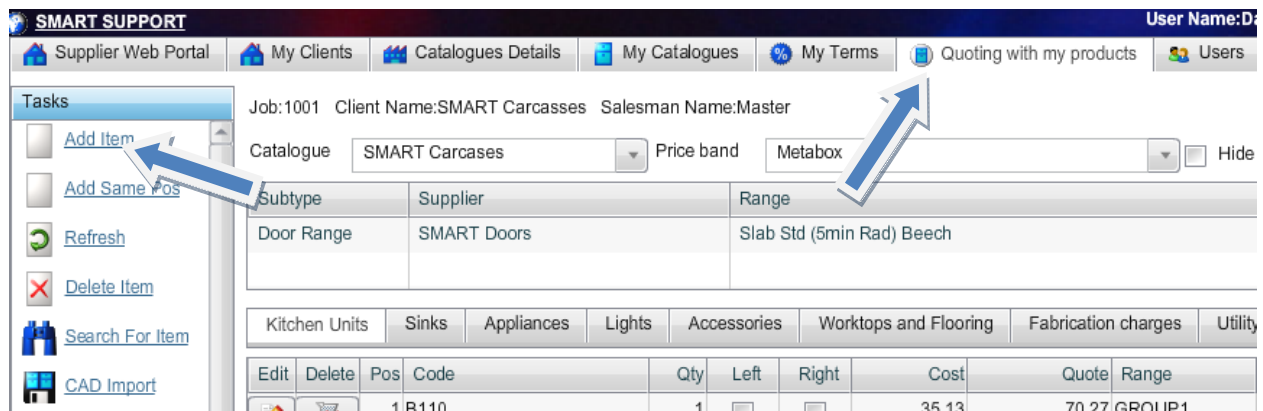


Quoting with your products

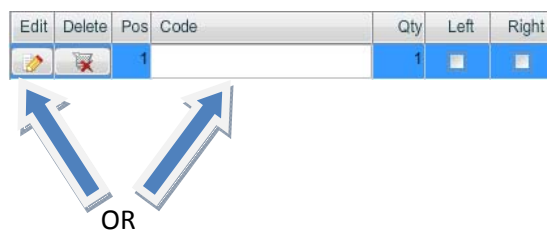
In this next section we will cover adding items into a quote, re-pricing the quote in a different range, editing items in a quote and importing a CAD design.

Adding an item into the quote

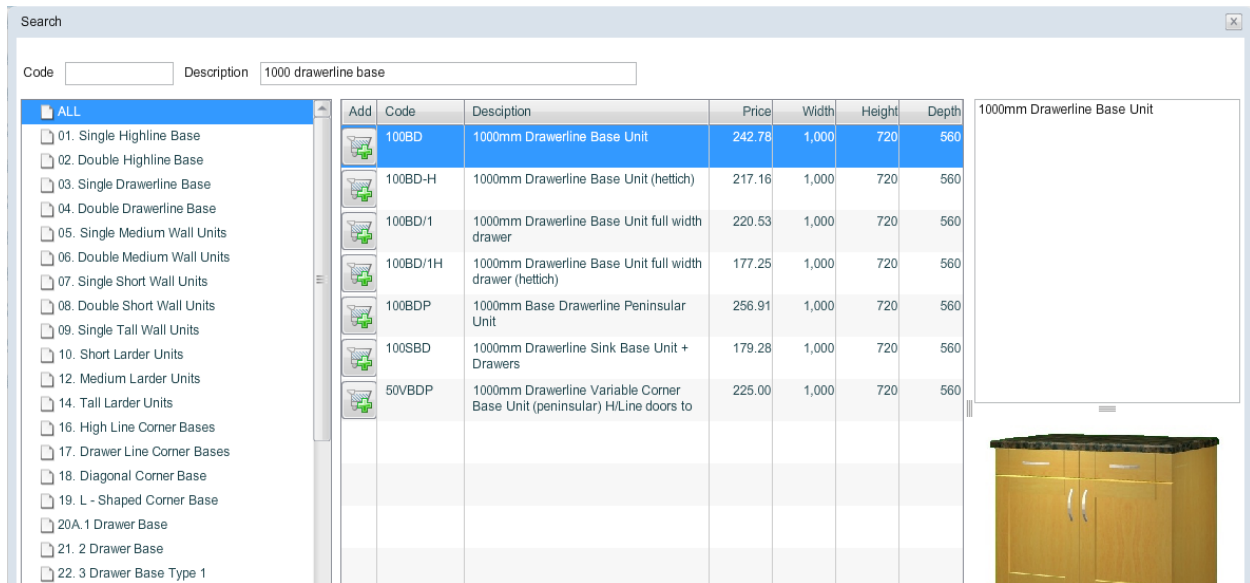
First click *Quoting with my products* from the navigation tabs at the top of the screen. There are two ways you can build your quote, entering the items one at a time or importing the items from a CAD drawing. Check the catalogue is your catalogue and select the price band you wish to check then pick the door supplier and range if applicable. Click *Add Item* from the menu on the left:



This will create an empty line in the grid with the code cell highlighted. If you know the code simply type it in and hit enter, this will bring the item in with the cost and quote prices calculated from the discounts and margins set up earlier. If you don't know the code either hit the edit button on the line or click search for item on the left menu, both do the same thing and can also be triggered by using the F8 key.



If you click the search / edit option it will bring up the search window in which you can find the item you wish to use by narrowing down the list by typing in words that you think will be in the description of the item. It does not matter which order the words appear in and it is not case sensitive. So in the example there is typed in '1000 drawerline base' and as you can see it has given a list of all items with those words in the description. You may also notice that you can search by category on the left; this requires setting up in order to use it for your catalogue, see the *maintaining catalogue section* further on in this guide.

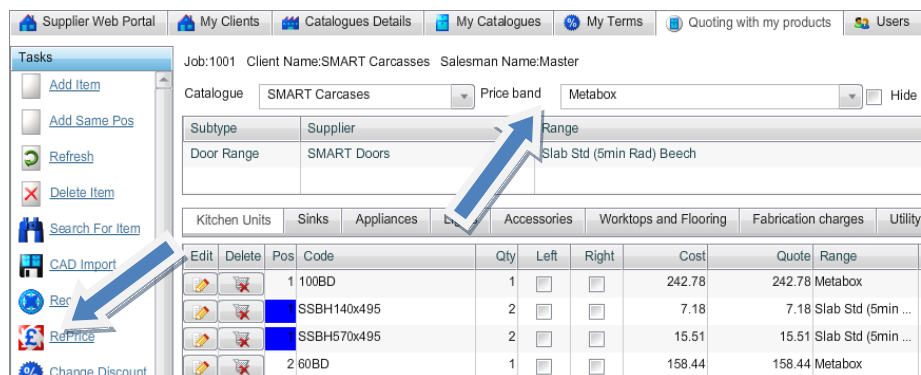


Simply either double click on the item you wish to use, highlight the item and enter, or click the button with a plus on it to add the item into the quote.

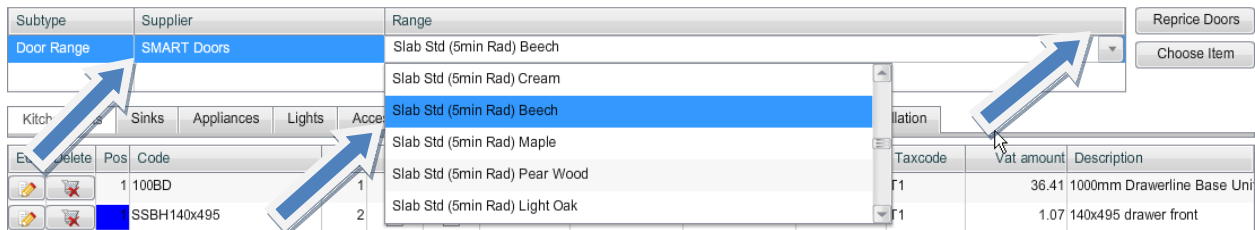
If you have entered a carcass it may not come in with the doors, you can attach doors to the carcass in the catalogue section so that when the carcass is selected the correct doors will be added automatically; this will help your customers quote quicker and reduce potential errors. To do this please see the *“Attaching child items section.”*

Repricing the items in a different range

To see the same kitchen in a different range or style, simply change the range at the top and select reprice from the left menu, this will go through and re-price all doors from that supplier in the new range. You can also tick certain items in the *selected* column to only re-price those items:



If you are doing carcasses and doors you can also re-price the doors in a different range / supplier by changing the values in the subtype supplier box and hitting *re-price doors*.

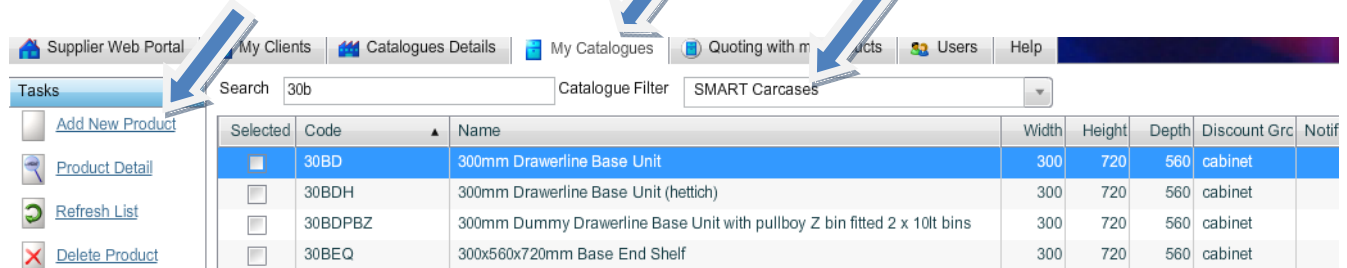


To edit an item you can simply type over the information and to change an item you can simply hit the button on the edit column and select a new item.

Maintaining the Catalogue

Adding New Products

To add new products you need to go to *My Catalogues* and select catalogue to which you want to add a new item and click on *Add New Product*.



Fill in new product detail: Code, Description, Width, Height, Depth, Discount Group, Category and Catalogue Price and press *Save*. You can also upload Picture or put Notification (important information that will come up when Items is added on the project) on the item.

Item Detail 30BD

Code: Supplier:

Description: Category:

Width: Height: Depth: Discount Group:


Notification:

Generic Description:

Picture File:

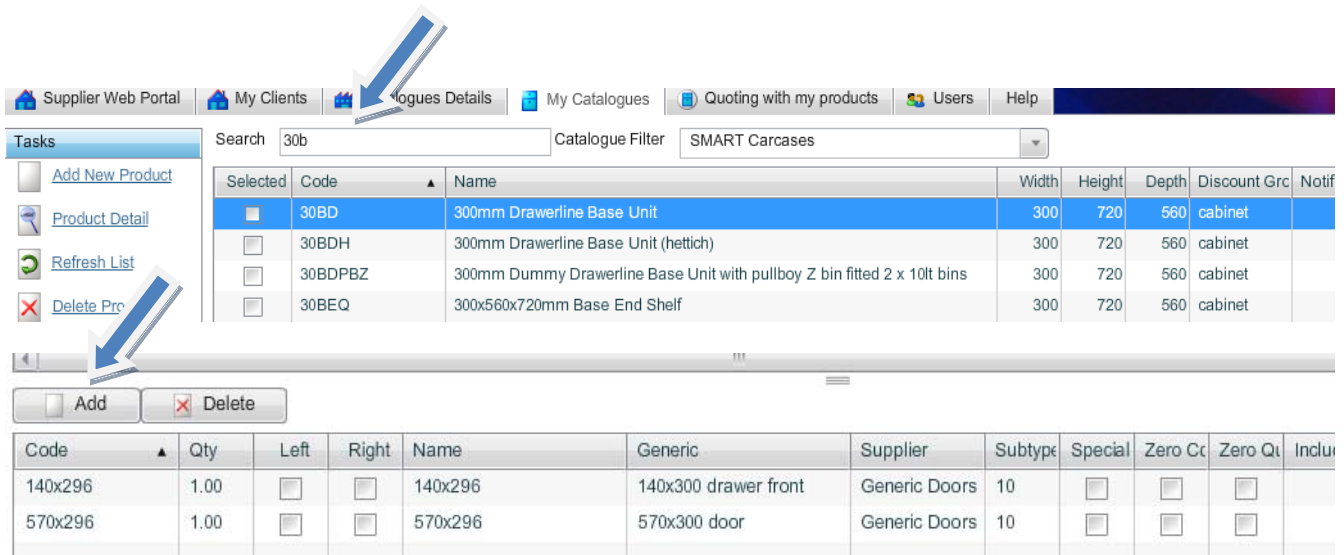
Property:

Price Gro	Name	Catalog P	Your Price	Sell Price	Margin
1	Metabox;Metabox	136.72	136.72	136.72	0.00
2	Tandembox;Tandembox	136.72	136.72	136.72	0.00



Adding Subcomponents/Child Items

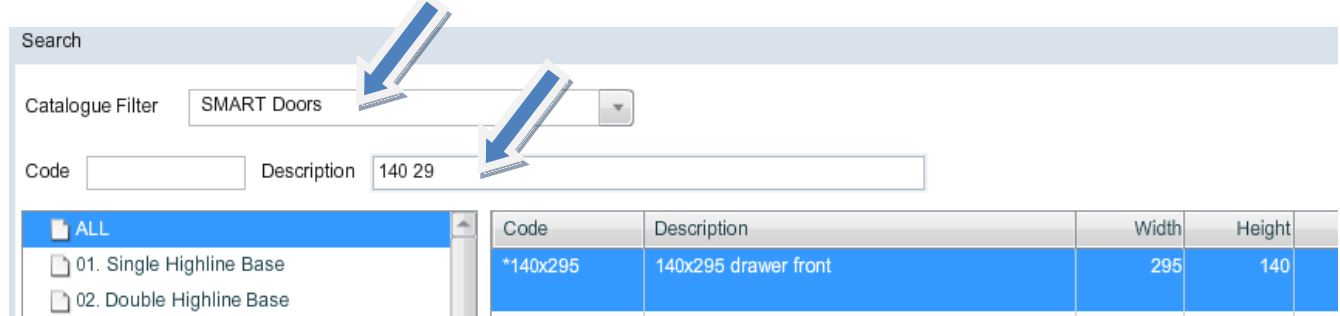
Find the item to which you want to add subcomponents to (example 30BD) and below click on *Add*.



The screenshot shows the Supplier Web Portal interface. The top navigation bar includes 'Supplier Web Portal', 'My Clients', 'Catalogues Details', 'My Catalogues', 'Quoting with my products', 'Users', and 'Help'. The main area has a search bar with '30b' and a 'Catalogue Filter' set to 'SMART Carcases'. A table lists products with columns: Selected, Code, Name, Width, Height, Depth, Discount Grc, and Notif. The first row, '30BD 300mm Drawerline Base Unit', is selected. Below the table are 'Add' and 'Delete' buttons. A second table shows subcomponents for the selected item:

Code	Qty	Left	Right	Name	Generic	Supplier	Subtype	Special	Zero Cc	Zero Qt	Inclu
140x296	1.00	<input type="checkbox"/>	<input type="checkbox"/>	140x296	140x300 drawer front	Generic Doors	10	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
570x296	1.00	<input type="checkbox"/>	<input type="checkbox"/>	570x296	570x300 door	Generic Doors	10	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

In the next window select item that you want to add to 30BD. In this case we are adding a 140x295 door.



The screenshot shows the search interface. The 'Catalogue Filter' is set to 'SMART Doors'. The search bar contains '140 29'. The search results table is as follows:

Code	Description	Width	Height
*140x295	140x295 drawer front	295	140

Please Note: Same way as we have attached the doors to the unit you can attach waste or plumbing kits to sinks or ducting kits to hoods/extractors.

Importing & Exporting Catalogue to CSV

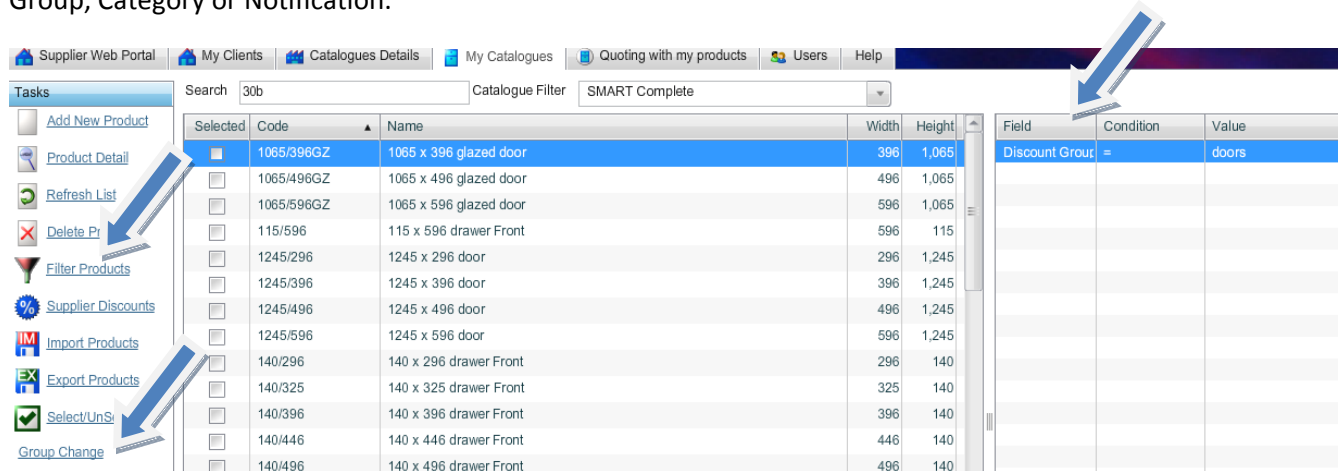
If you want to make changes to your catalogue in Excel you can click *Export Products* and once the changes are made you can import it back.



Using Group Change

This can be used if you want to change Discount group, Notification or Category for a group of items.

You can use the Filters to select a group of items and then using *Group Change* you can change Discount Group, Category or Notification.



The screenshot shows the Supplier Web Portal interface. The top navigation bar includes links for Supplier Web Portal, My Clients, Catalogues Details, My Catalogues, Quoting with my products, Users, and Help. Below the navigation bar, there is a search bar with the text '30b' and a 'Catalogue Filter' dropdown set to 'SMART Complete'. On the left side, there is a 'Tasks' menu with options: Add New Product, Product Detail, Refresh List, Delete Product, Filter Products, Supplier Discounts, Import Products, Export Products, Select/Unselect, and Group Change. The main area displays a table of products with columns: Selected, Code, Name, Width, and Height. The first row is selected. On the right side, there is a table with columns: Field, Condition, and Value. The first row in this table has 'Discount Group' in the Field column, '=' in the Condition column, and 'doors' in the Value column. Blue arrows point from the 'Group Change' button in the Tasks menu to the 'Group Change' button in the main interface, and from the 'Group Change' button to the 'Discount Group' field in the filter table.

Selected	Code	Name	Width	Height
<input checked="" type="checkbox"/>	1065/396GZ	1065 x 396 glazed door	396	1,065
<input type="checkbox"/>	1065/496GZ	1065 x 496 glazed door	496	1,065
<input type="checkbox"/>	1065/596GZ	1065 x 596 glazed door	596	1,065
<input type="checkbox"/>	115/596	115 x 596 drawer Front	596	115
<input type="checkbox"/>	1245/296	1245 x 296 door	296	1,245
<input type="checkbox"/>	1245/396	1245 x 396 door	396	1,245
<input type="checkbox"/>	1245/496	1245 x 496 door	496	1,245
<input type="checkbox"/>	1245/596	1245 x 596 door	596	1,245
<input type="checkbox"/>	140/296	140 x 296 drawer Front	296	140
<input type="checkbox"/>	140/325	140 x 325 drawer Front	325	140
<input type="checkbox"/>	140/396	140 x 396 drawer Front	396	140
<input type="checkbox"/>	140/446	140 x 446 drawer Front	446	140
<input type="checkbox"/>	140/496	140 x 496 drawer Front	496	140

Field	Condition	Value
Discount Group	=	doors

Group Change Dialog

Field Name:

Value: