



# DEALER PORTAL 3.0

*USER'S GUIDE*



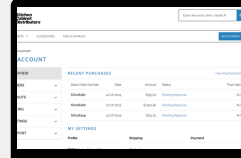
# DEALER PORTAL 3.0

## WHAT'S NEW IN 2020

1

### NEW LANDING PAGE

You're taken directly to your account summary for easier access to your orders and account information.



2

### MULTIPLE LOG-IN'S

No sharing passwords! Assign a separate log-in to as many users as you would like. Each user will have a separate cart, allowing for multiple open sessions at one time!

3

### HINGE PLACEMENT

Specify hinge placement options for assembled orders!

A screenshot of the 'Hinge Placement' form. The form has a table with columns for 'SKU', 'HL', and 'HR'. The rows are 'LV-815' and 'LV-809'. The 'HL' and 'HR' columns have input fields with values '0' and '1' respectively for 'LV-815', and '1' and '0' for 'LV-809'.

SKU	HL	HR
LV-815	0	1
LV-809	1	0

4

### STREAMLINED ORDERING

Add to your cart to create a quote AND place an order, no more open quotes left hanging or wondering if it's been submitted!

5

### CHANGE CABINET LINES

Added everything to your cart only to realize you needed it in a different cabinet line? You can now change the lines in your cart!

A screenshot of the 'Switch Cabinet Lines' form. The form has two dropdown menus labeled 'From' and 'To'. The 'From' dropdown is set to 'Brooklyn White' and the 'To' dropdown is set to 'Brooklyn Gray'. There is a 'Switch Lines' button to the right of the dropdowns.

From	To
Brooklyn White	Brooklyn Gray

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# ACCESS

Access to the Dealer Portal:

***<http://portal.kcdus.com>***

*For the best experience, we recommend using the latest version of Chrome or Firefox.*

## LOGIN

*(Existing Users: Your email and password remain the same)*

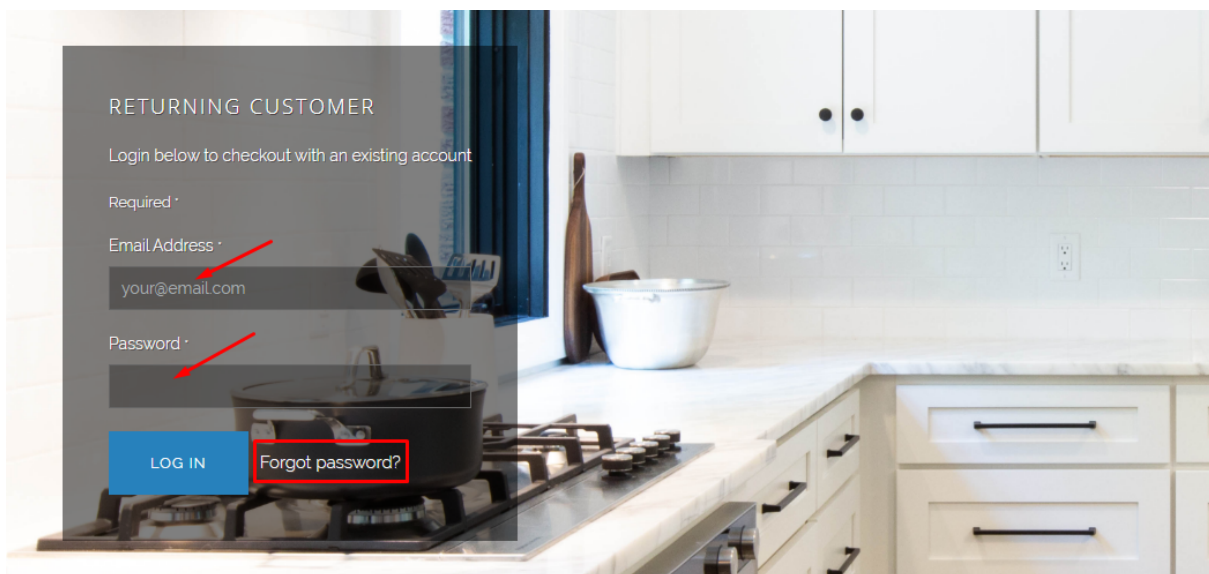
**Email Address:** This will be the main email on your account.

**Password:** This will be supplied to you in email by KCD.

*Forgotten passwords can be retrieved by clicking "Forgot Password?"*

**NEW!**

Multiple log-in's per company now allowed! Contact us at [dealerportal@kcdus.com](mailto:dealerportal@kcdus.com) for more info.



# HOMEPAGE

## NAVIGATING

After logging in, you will now be taken straight to your Account Overview. From here you can view your orders, layouts, invoices, and change your password.

### ORDERS

This is where you can find your Sales Orders, Quotes, and Returns.

### LAYOUTS

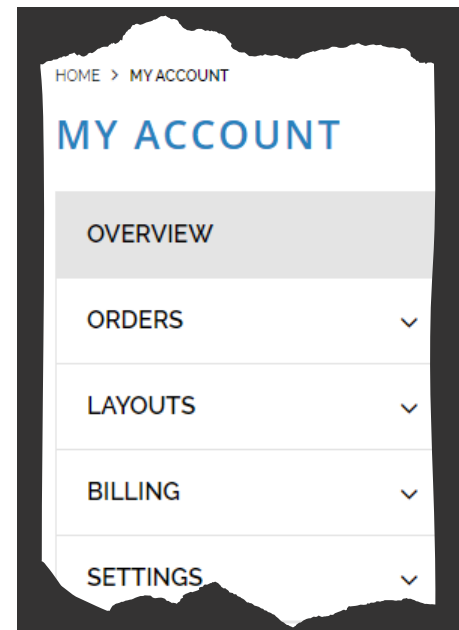
Use Layouts to create a list of products by PO # that can be edited and re-ordered as many times as you'd like.

### BILLING

View your account balance, invoices, transaction history, or print a statement.

### SETTINGS

See and update your addresses, credit cards, and password.





# HOW TO ORDER

## OPTIONS

### QUICK ORDER

Quick order can be used if you already know the item numbers of the products. You can enter by item and quantity and they are automatically added to your cart. *(pg. 4)*

### PRODUCT PAGES

If you'd like to see an image of the cabinet or just want to browse through the different cabinet lines while you order, go to the tab labeled Cabinets at the top. *(pg. 5)*

### LAYOUTS

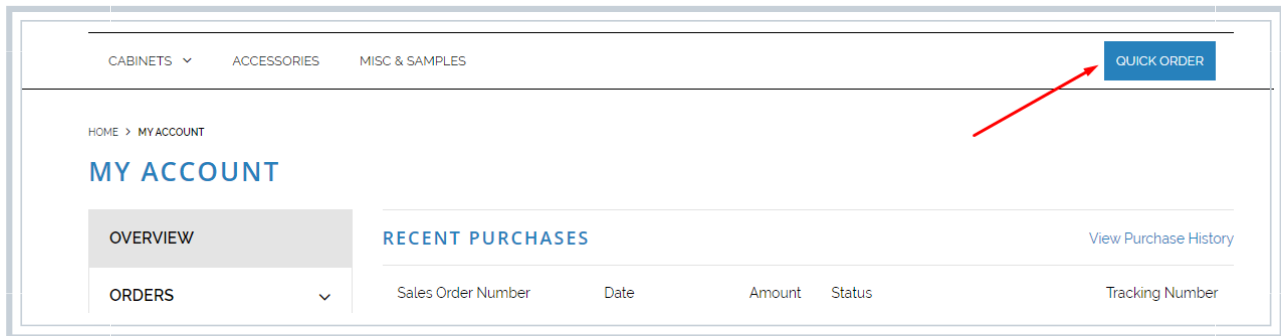
Layouts can be really useful if you're quoting a job and may need to make changes later. Once you create a Layout, it will always be open and editable, no matter how many times you submit it as either a quote or a sales order. This is your best option for creating quotes that you're not ready to move forward with. *(pgs. 6-8)*

**More details on each option in the following pages.**

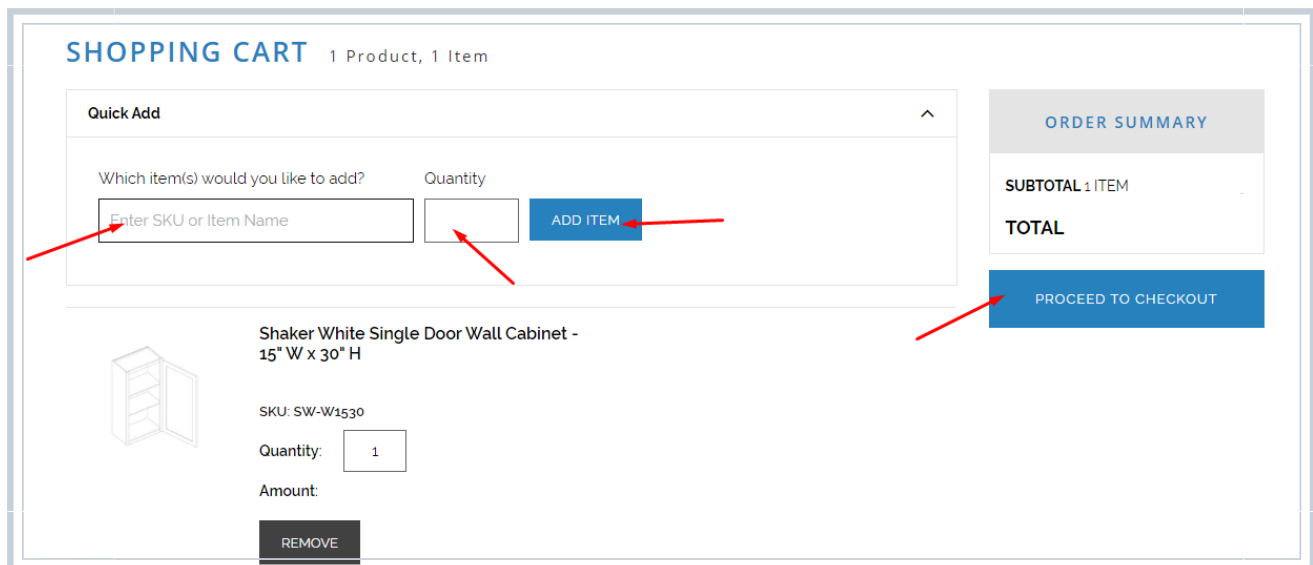
# QUICK ORDER

Quick order can be used if you already know the item numbers of the products. You can enter by item and quantity and they are automatically added to your cart.

From your account overview page, click on Quick Order at the top right



This will bring you to your shopping cart where you can enter the item # and the quantity. Once you click Add Item, they will automatically be added to your cart. Once you're done adding items, simply click Proceed to Checkout.

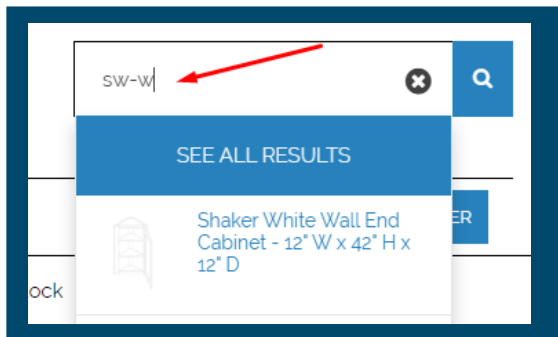
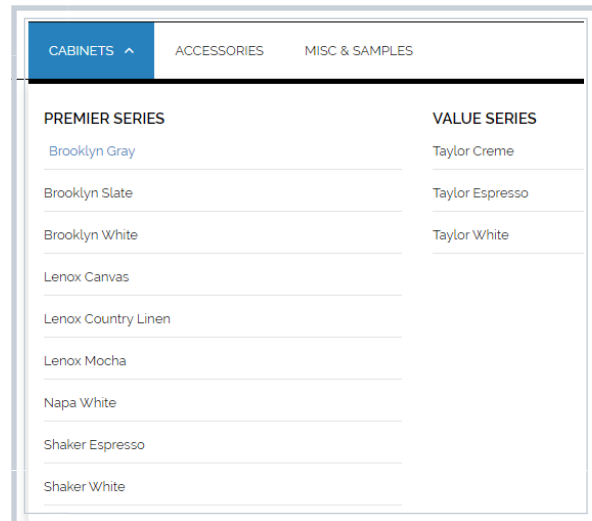


# PRODUCT PAGES

If you'd like to see an image of the cabinet or just want to browse through the different cabinet lines while you order, go through the tab labeled Cabinets at the top or type in partial text or a full SKU in the search bar.

## PRODUCT DETAILS

From your Account Overview page, you can toggle through our different product lines by clicking on the Cabinets option at the top.



You can also reach the Product Pages by typing in partial text or a complete SKU in the search bar found at the top right.

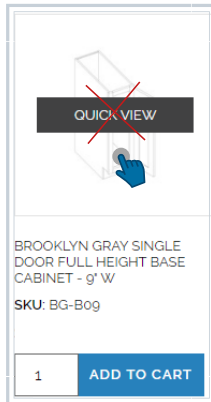


Once you've selected a line, you will have an option to narrow by Product Type (walls, bases, tall, etc.). To the right, you will see images of the cabinets and pricing.

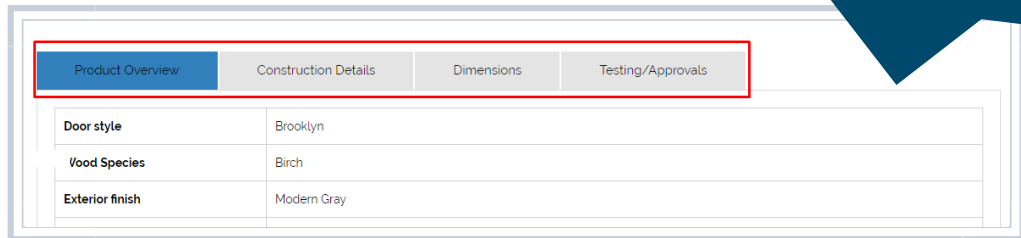
**Product pages continued on next page....**



# PRODUCT PAGES

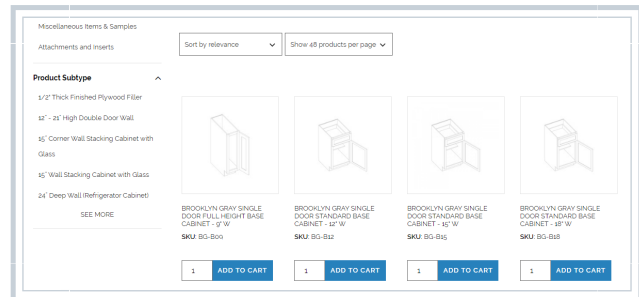


To see more information about a cabinet, click on the image itself. You'll find the Overview, Construction Details, and Dimensions.



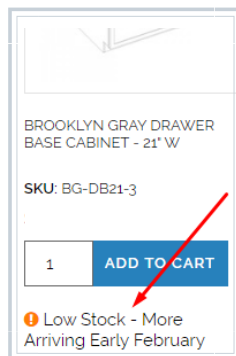
## ORDERING

To order, simply select the quantity you want under the image and click Add to Cart. You can continue doing this until all items have been added.

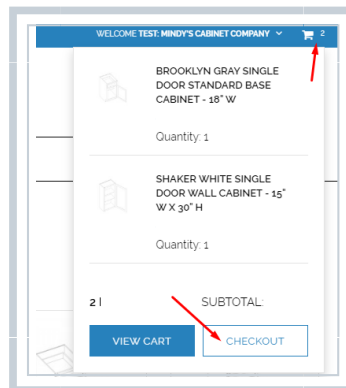


**NOTE: The image is simply a representation of the type of cabinet you are ordering, it is not an image of the actual cabinet profile. (Shaker 5pc will be indicated in the item description)**

If an item is "Low Stock" or "On Order", you will see a flag under the item indicating this. If an ETA is available, this will be listed as well. These alerts can also be seen in your cart and during checkout.



- Low Stock
- On Order



## CHECKOUT

To checkout, click on your cart in the top right and then click Checkout.

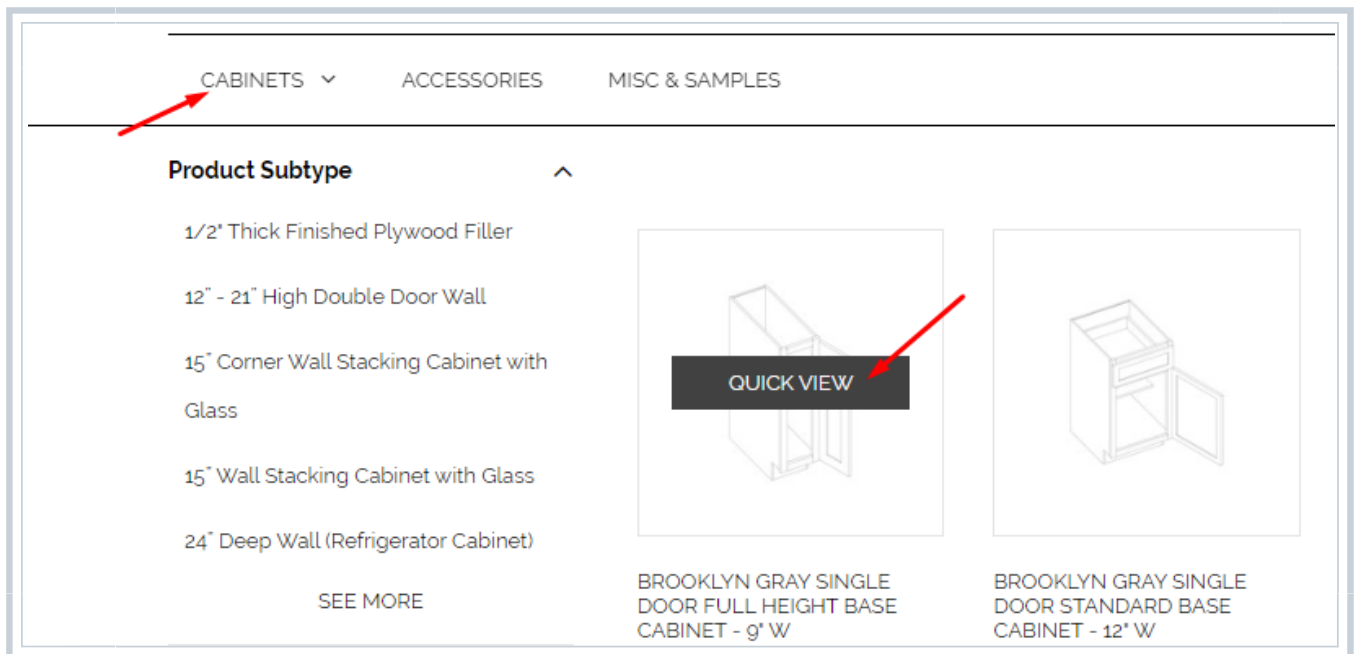


# LAYOUTS

*Layouts can be really useful if you're quoting a job and need to make changes to it later. Once you create a Layout, it will always be open and editable, no matter how many times you submit it as either a quote or a sales order. This is your best option for creating quotes that you're not ready to move forward with.*

## ORDERING

Click on the Cabinets option at the top of the page and navigate to the product line you would like to order. Find the first item you want to add to a layout and click on Quick View.



**TIP:** *If you type an item in the search bar at the top right, this will also bring you to Quick View for that item.*



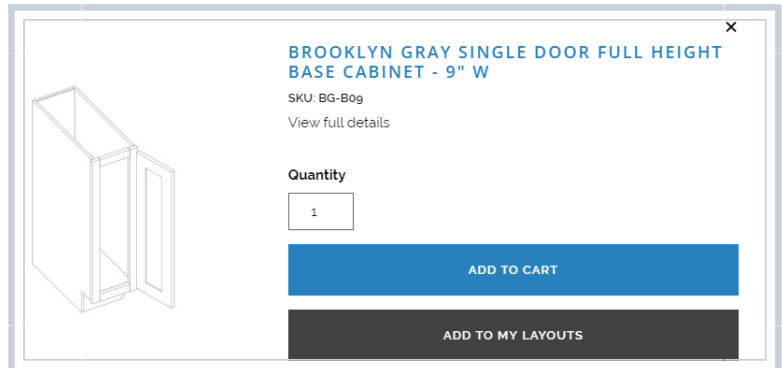
**Layouts continued on next page....**

# LAYOUTS

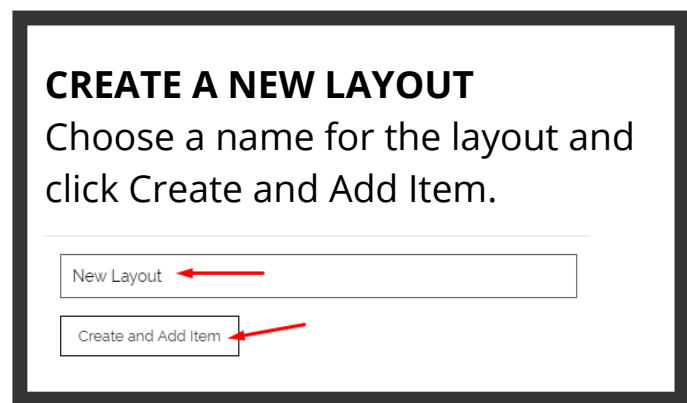
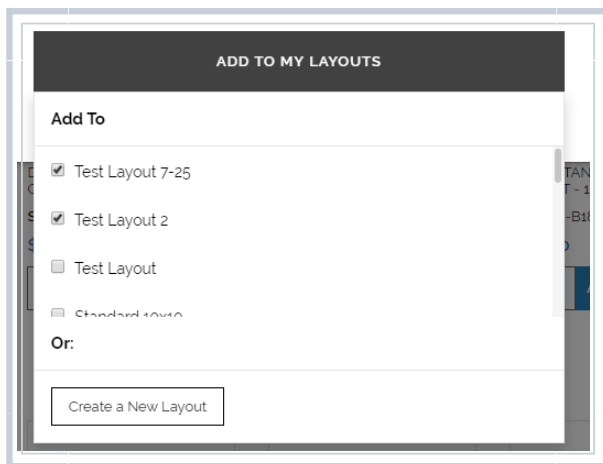
## QUICK VIEW

In Quick View, you have an option to Add to Cart or Add to My Layouts.

You can also navigate to the product details by clicking on "View full details".

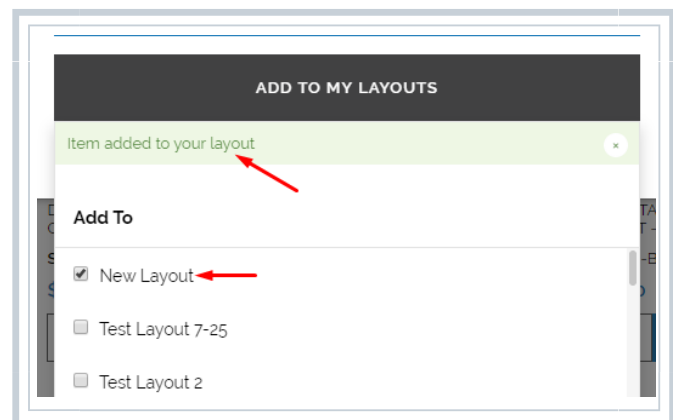


Once you click on Add to My Layouts, you have the option to Create a New Layout or add to an existing Layout.



You will see a green bar at the top letting you the item was added to your layout - and you will see your new Layout listed below and checked.

**NOTE:** The item will be added to any Layouts with a check mark, so make sure you double check you have the correct one(s) selected.

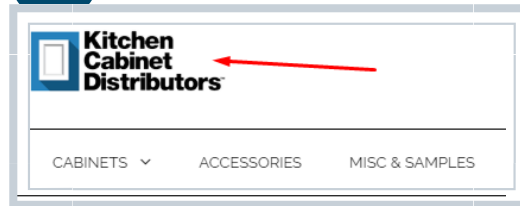


**Layouts continued on next page....**

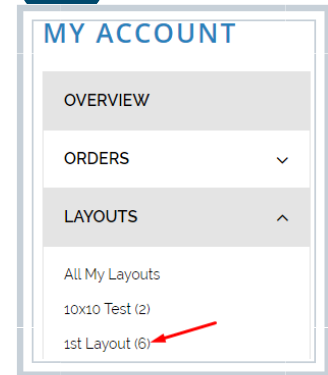
# LAYOUTS

1.

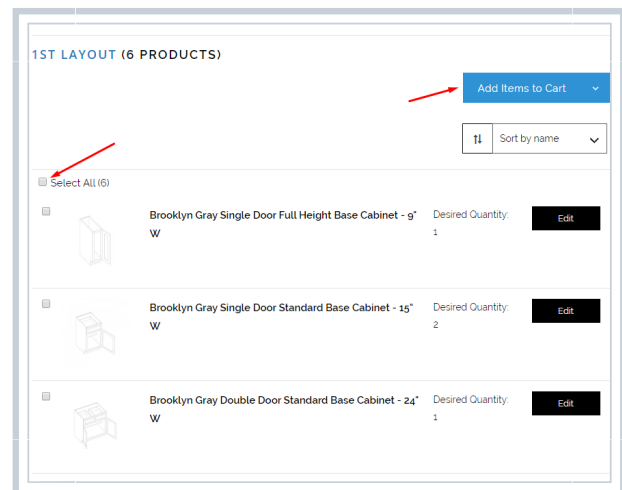
After adding all items to your newly created Layout, click the Logo at the top to go back to your account Overview and select the layout you want to quote (under Layouts).



2.



To the right, you will see all of the items you added to that layout. From here, you can edit the quantity, remove items, and decide which items you want to add to your cart. To add all items, click Select All and then Add Items to Cart.



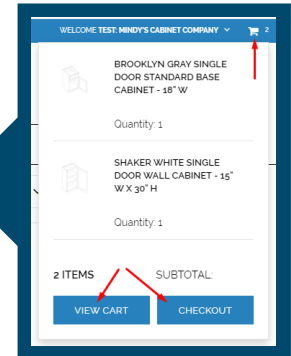
Once all items are in your cart, you can now proceed to checkout and will have the option to save it as a quote or place the order.

***NOTE: Your layout will always be open and editable. You can submit the same layout as a quote or sales order as many times as you'd like.***

# YOUR CART

***Your options for Flat/Assembled, save as a Quote or Sales Order, and all pricing will be found during the Checkout process.***

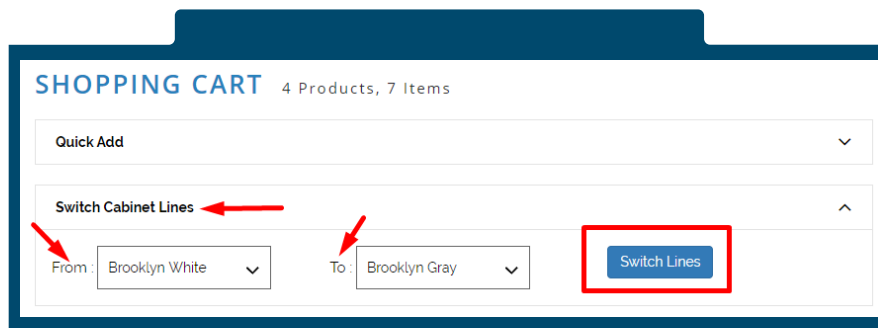
When clicking on your cart in the top right, you have the option to View Cart or Checkout. If you'd like to review your cart before checking out, click View Cart.



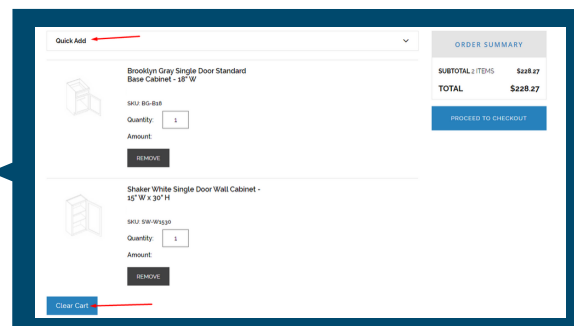
## Switching Cabinet Lines

If you need to change the cabinet line for the items you're quoting or ordering, the only place to do this is in the cart (or Quick Order).

1. After items are added to the cart, go to the cart and click on "View Cart"
2. Under Quick Add, you'll see an option called "Switch Cabinet Lines"
3. Choose the line you want to change ("From") and then choose the line you want to change to ("To")
4. Click Switch Lines
5. If there are multiple lines in your cart, it will only look/change items you selected in the From field



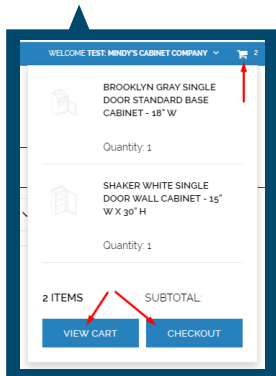
If you need to clear your cart, at the very bottom there is an option to Clear Cart. You can also edit items or add/delete items. If no changes are needed, simply click Proceed to Checkout.



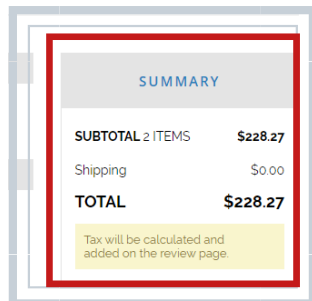
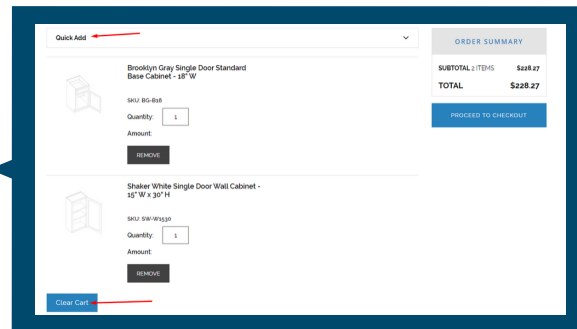
# CHECKOUT

***Your options for Flat/Assembled, save as a Quote or Sales Order, and all pricing will be found during the Checkout process.***

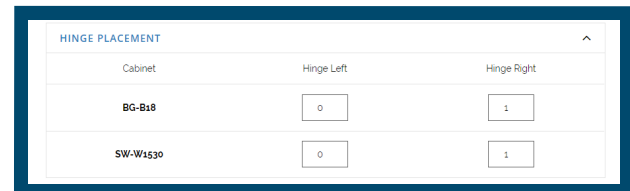
When clicking on your cart in the top right, you have the option to View Cart or Checkout. If you'd like to review your cart before checking out, click View Cart.



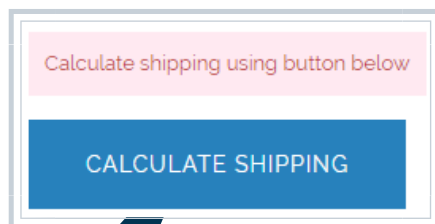
When viewing your cart, you can edit items, add items, or Clear Cart. If no changes are needed, simply click Proceed to Checkout.



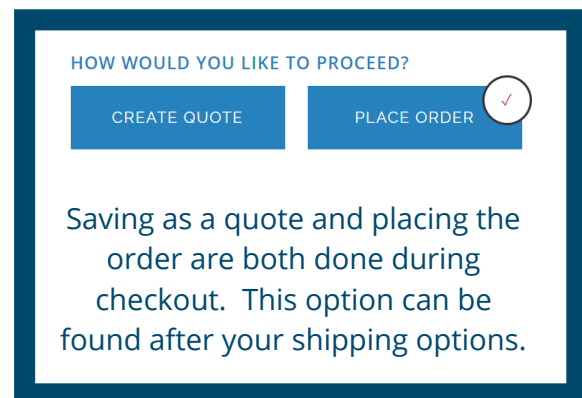
During Checkout, as you select options, your Summary box will update pricing as you go.



If selecting Assembled, you will see options for hinge placement for any relevant cabinets on your order.



Once you verify your shipping address, select Calculate Shipping to see shipping options available and pricing.



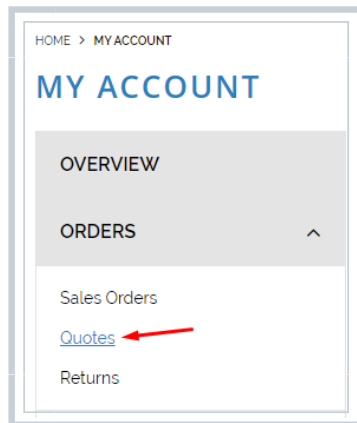
Saving as a quote and placing the order are both done during checkout. This option can be found after your shipping options.

***You will have a chance to review and place your order on the next step.***

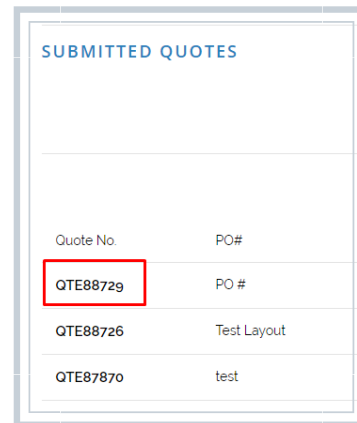
# APPROVING A QUOTE

If you submitted an order as Quote during the checkout process, you can approve the quote and check out without having to contact us.

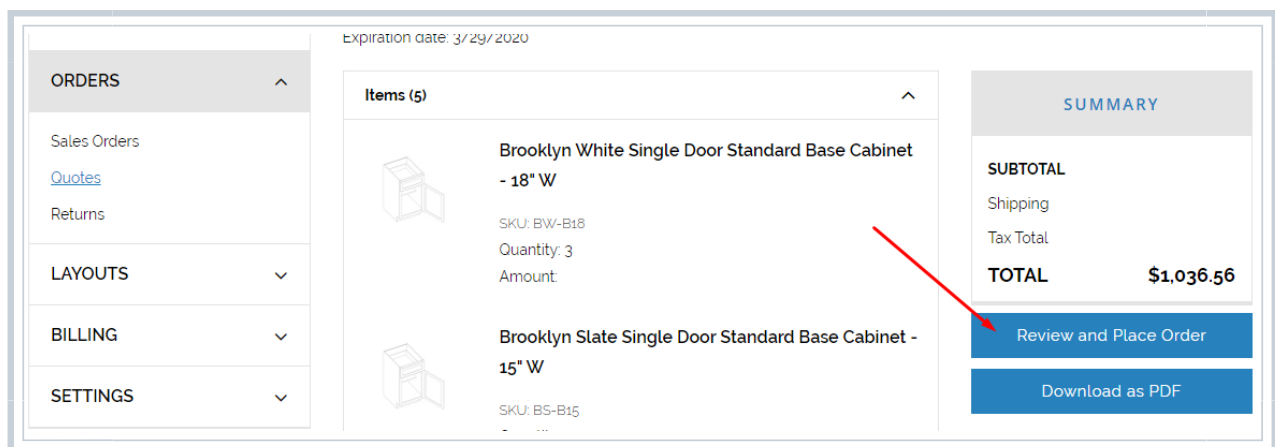
1. Under your Account Overview, navigate to your Quotes.



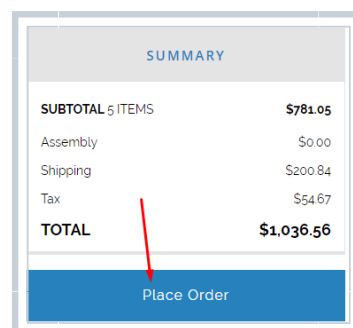
2. Click on the Quote you would like to approve.



3. To the right, under the Summary box, you will see an option to Review and Place Order.



4. Once you review the information for accuracy, click the Place Order button. KCD will review your order and approve for processing.



# PAYING INVOICES

As a terms customer, you have the ability to pay invoices online by credit card.

Under the Billing section, click on Invoices. Select the invoice(s) you want to pay and click "Make a Payment".

Invoice No.	PO#	SO#	Date	Due date	Amount
INV132334	Qte	Sales Order #SO115123	3/12/2020	4/11/2020	\$1,191.02
INV132335	test	Sales Order #SO115143	3/17/2020	4/16/2020	\$1,300.00

In the next screen, confirm the invoice(s) you would like to pay are selected and click Continue.

Invoice No.	Due date	Amount
Invoice #INV132334	4/11/2020	\$1,191.02

Enter or select your credit card information. Once complete, click Submit. You will be provided the payment # for your records.

Item	Amount
Invoices (1)	\$1,191.02
Deposits Subtotal	\$0.00
Credits Subtotal	\$0.00
Convenience Fee	\$32.75
Payment Total	\$1,223.77



# TROUBLESHOOTING

Below are some initial troubleshooting steps you can take to try to fix any issues you may be experiencing:

- ➔ Double check your bookmark - if in doubt, re-enter the web address: <http://portal.kcdus.com>
- ➔ Log out from the main menu at the top, close out your browser window and reopen a new webpage to log back in (clicking the "x" on your browser will not sign you out)  
**Follow this step if you have been redirected to any screen other than the main login**

- ➔ Clear your cache - this is an option when clearing your browsing history

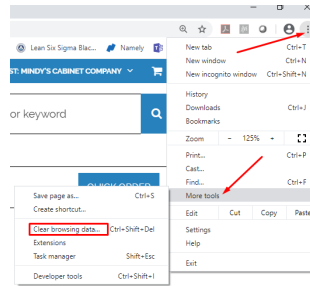
### In Chrome:

Go to the 3 dots at the top right.

Click on More Tools, then

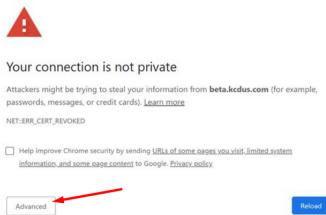
Clear browsing data...

Cached images and files should be selected



- ➔ Try using an InPrivate browsing window

- ➔ For certificate issues, you should have an option to click **Advanced** and then **Continue**.



If that doesn't work, visit this site for more help. <https://classroom.synonym.com/unblock-using-chrome-17965.html>

## HOW TO REPORT BUGS



- Email [dealerportal@kcdus.com](mailto:dealerportal@kcdus.com)
- Let us know what you were doing when the error occurred
- Provide screenshots of the error if possible
- If you can not wait for a resolution, you can email your order into [customer care@kcdus.com](mailto:customer care@kcdus.com)

# FAQ's

*Please contact us at [dealerportal@kcdus.com](mailto:dealerportal@kcdus.com) for any questions not answered below.*

## Who has access to my account?

KCD will only send login information to the main email on the account. Sharing your account login information is solely up to you.

## Can I have multiple Logins for my account?

Yes! You can now set up multiple login's for various people in your organization. Each login will have their own cart but will have access to all the same ordering history and payment information.

## How do I make changes to a quote or sales order?

Once a Quote or Sales Order is submitted, you can no longer make edits on the website. For Quotes, contact Customer Care for any changes. Once you place a sales order, changes are not permitted. If a change is unavoidable, a \$100 change fee may be applied.

## Is your website secure?

Our web site is secure and follows industry standards and best practices around security. The login page is not behind a secure certificate (SSL), however after logging in you will see that the following page is behind a secure certificate. The login page is safe as well, as password data is encrypted.

## Why do I have to visit an unsecure site to visit your site?

The reason you have to login to an unsecure site, is this is how the platform that we used to build our Dealer Portal is designed.

## What do I do if I'm unable to login?

Double check your email and password were entered correctly. If you forgot your Password, click Forgot Password to reset it. In the Troubleshooting section above, there are other tips on how to navigate through Login or other issues you encounter.

# FAQ's

## What happens to my Open Quotes?

Open Quotes were a highly customized feature that caused glitches and bugs in our previous version. As part of the rebuilding process of the back-end, it was necessary to build a process that was more intuitive to our system.

Any Open Quotes entered prior to the upgrade will be converted into product lists and available under the Layouts section.

## What do I do if I need to add assembly notes or modifications?

Unfortunately Modification are still not allowed on this version, but will be soon. If you have any modifications or assembly requests that need to be applied, simply put the instructions in the Assembly Notes section during Checkout. We will make the adjustments on our end and resend the order to you for approval.

## What if I want pricing but don't want to submit an official quote?

Layouts are the best option for quoting something you're not ready to submit. Layouts are basically product lists that can be submitted as many times as you'd like. Build a Layout, move the items to the cart, then follow the Checkout prompts to get pricing.

No matter how many times you move a Layout to your cart, the list of products will always be available under Layouts.

## What if I need to add an item after I have placed an order?

We typically can make changes within 1 hour after an order is submitted. Changes requested after that are not permitted and may be subject to a \$100 change fee.

## Can I cancel orders or items placed on an order at any time after I submit it?

We typically can make changes within 1 hour after an order is submitted. Changes requested after that are not permitted and may be subject to a \$100 change fee.