

Khaos Control Cloud Setup Guide

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1. Introduction

This setup guide is designed to help you set up your Khaos Control Cloud for your business. There are tooltips available to describe each option within the application itself, just hover your mouse above the option to display the information associated with it.

The Help menu is also available by clicking on the Help button in the top right of your screen or selecting Help from the navigation bar from within any screen in the system. It's context-sensitive and will display relevant information depending on where you are within Khaos Control Cloud. The information includes:

- A description of the main page you are using
- Information on the fields within the current screen
- A list of related videos which will guide you through important tasks related to the screen that you are on

2. Creating and configuring Users

2.1 To create new users for your Khaos Control Cloud system:

1. Login to your Admin Portal
2. Click on the Users icon on the left navigation bar
3. Create a user using the panel on the right
 - a. Add a username
 - b. Tick the User Account Active checkbox
 - c. Click the Create button below
4. You can edit the information by clicking on the Edit button for the user and update their username or password. Remember to click the Update User when finished.

2.2 To define user defaults:

1. Login to your live Khaos Control Cloud application as any Admin user
2. Click on System Setup on the left navigation bar
3. Click on User List

From here, you can go into edit mode and update the user's full name and user defaults, such as default sales source, invoice priority and stock control site for new orders created by a user.

2.3 To define user permissions:

From within the User List, double click on the line for the user to open the user permissions popup. The popup will have different sections within the system, and the ability to enable or disable certain functionality for the user by using the toggles next to the functions. It's worth noting that the Admin toggle on the top left overrides the other toggles, so ensure to turn this off if you wish to define specific permissions underneath.

There is also the ability to copy user permissions from another user to the user you are currently editing, using the "Copy From..." function on the bottom left of the popup. This is useful in scenarios where you might have multiple telesales operatives you wish to give the same user permissions to,

you can define the permission for the first user and copy these to the other telesales operative users.

3. System Values

System Values is found under System Setup from the left navigation.

To edit any of the options in System Values:

1. Click on the Edit button in the top right
2. Overwrite the example information with your details, select an option from a drop-down list or enable/disable an option using the toggle
3. Save the changes using the Save Screen button in the top right

3.1 General Tab

Company Details

This screen contains fields in relation to the business' name and address, telephone numbers, email address and web site. The company number and registered address (if applicable) that appear in the legal imprint are also maintained here. The information specified here will be used on customer and supplier facing documentation, for example purchase and sales orders.

Where branding is used, the information setup against the brand will be used instead, however it's important to note that branding can only be defined for sales. Purchase documents will always use the details defined under this Company Details section.

Document Prefixes

The Document Prefixes screen enables you to specify the code prefixes for company documents.

Pad Codes

Pad Codes To indicates the maximum number of zeroes to put into document codes to convert them to a required length. If the Pad is set to 4, purchase and sales order codes will be in the range 00001-99999, with the PO or SO Code prefixes if defined. Consider how many orders you are likely to take and assume several years of this volume before deciding on what level to pad your codes to.

Prefixes

The prefix allows you to add letters so that it is easier to see at a glance what type the document is. For example, if you would like all sales order numbers to start with 'S' followed by the next sequential number, then you would put S in the "SO Code Prefix" field. Similarly, you can do this for other document types listed under this section. This can be useful as in some screens, different document types can appear in the same grid, for example Sales Orders and Credit Notes.

Notes and Caveats:

1. *At a minimum, we recommend the use of "CN" (or an alternate prefix) for Credit Notes. Failure to assign a unique prefix to Credit Notes is likely to result in confusion when viewing lists of Sales Invoices and Credit Notes.*

2. It is not recommended to use the letter O as the last letter of a prefix, for example SO for sales order, as this is easily confused with a 0 and can cause problems if a customer is trying to inform you of their sales order code, for example SO000123.

New Company Defaults

The following defaults can be setup so that when creating a new customer or supplier their record will be setup with the default options defined here. All the options must be setup in System Data before they are available here. When creating a new customer or supplier these default options can be changed if required.

Customer Class

Company Classes are setup in [\[System Data | Company Classes\]](#) where you can define characteristics of the Company Class such as whether they are pre-payment or account customers, default credit limits and account payment terms and so on. By selecting them from the drop down, all new customers will inherit the characteristics of the Company Class assigned to them unless their customer class is manually changed.

Besides defining the options against a company, Company Classes can also be used in many areas of the system. Sales nominals and nominal classifications can be assigned to specific company classes for accounting purposes, as well as linking promotions to specific company classes including price lists, keycodes and special offers for promotions. Company Classes are also used in Sales Reports.

Notes and Caveats

1. If the default Customer Class has a price list assigned to it in, as defined in [\[System Data | Company Classes\]](#), this will also be applied by default to a customer.

Customer Type

Customer Types are setup in [\[System Data | Company Types\]](#). This allows you to group types of customer, for example;

[Charity] Animal Rescue Centre	[Supplier] Utilities	[Trade] Hotels
[Charity] Shop	[Supplier] Manufacturer	[Trade] Exhibition Venue
[NHS] Surgery	[NHS] Hospital	[Trade] Distributer

If you have different Company Types you may wish to consider prefixing them with the related Company Class, as shown in the examples above.

Customer Status

Company Status is setup in [\[System Data | Company Status\]](#) and is used to indicate whether the company is active or dormant.

Supplier Class

The Supplier Class is identical to the Customer Class except it defines the defaults for new suppliers. It is setup in [\[System Data | Company Classes\]](#). It enables you to separate your suppliers if required, for example if you would like separate classes for utility suppliers and stock suppliers.

Data Protection

Setting the Data Protection when you create new companies is very important. Like many of the previous options they are setup in [\[System Data | Data Protection\]](#). The system allows you to configure Data Protection against both companies and individual contacts within companies.

Customer Price List

Price Lists allow you to configure different sell prices for your customers. The prices will then be automatically applied to the sales order for the customer if they qualify when the stock items are added. The Price Lists are created in [\[System Data | Price Lists\]](#). They are then configured in the [\[Promotions\]](#) area of the system. For the hierarchy see the notes below.

Notes and Caveats

1. *If the default Customer Class has a price list assigned, the Company Class price list will apply instead of any default customer price list specified in this section (covered below).*

Financial Setup

This section allows you to configure your VAT country, year month end and the currency that your accounts will use.

Printouts

You can add a logo that will appear on your printouts, either by uploading a local image file or pasting the URL of a hosted image file.

3.2 Stock Tab

STOCK CONTROL

Allow Fractions

This option controls whether stock items can be sold in part. For example, if you stock raw materials such as wood or fabric and each stock item is equal to 1 metre of material, you will need this toggle enabled in order to be able to sell 1.5 metres of material. With the toggle disabled, you will only be able to sell stock items in whole units, in other words you can sell 1 or 2 items of stock but not 1.25.

LOOKUPS

Open Stock Lookup

In most areas of the system where you can see or filter stock items, such as the Stock Item list or grid popup when adding stock items to sales orders, this functionality controls whether the entire stock inventory is populated on stock item grids or whether the grids are initially unpopulated and stock items must be searched for in order to return results.

NEW ITEMS

Default Publish on Web On

This option determines whether newly created stock items are enabled as “Default Publish on Web” (toggle enabled) or not (toggle disabled). The default publish to web option on stock items themselves will create stock items on websites via the 3rd Party API, BigCommerce, Reverb and Shopify channel integrations.

EDITING ITEMS

Unique Stock Codes

- If enabled, the system will not allow more than one stock item to be saved with the same Stock Code.
- If disabled, the system will allow multiple stock items to be created with the same Stock Code.

Unique Other Refs

- If enabled, the system will not allow more than one stock item to be saved with the same Other Ref.
- If disabled, the system will allow multiple stock items to be created with the same Other Ref.

Stock Description Case

This function determines how stock descriptions are displayed within the system, and on subsequent printed documents such as purchase and sales orders.

- **Default** – Legacy setting, do not use.
- **Upper Case** – Will force stock descriptions to upper case when saved, irrespective of how they are entered.
- **Lower Case** - Will force stock descriptions to lower case when saved, irrespective of how they are entered.
- **Normal** - Will force stock descriptions to have the initial letters of each word capitalised, followed by lowercase thereafter when saved, irrespective of how they are entered.
- **User Raw** – Will not change the format of the stock description and will save exactly as the user has entered it.

Stock Code Case

This function determines how stock codes are displayed within the system, and on subsequent printed documents such as purchase and sales orders.

- **Upper Case** – Will force stock codes to upper case when saved, irrespective of how they are entered.
- **Lower Case** - Will force stock codes to lower case when saved, irrespective of how they are entered.
- **User Raw** – Will not change the format of the stock codes and will save exactly as the user has entered it.

STOCK VALUE

Stock Value Calculation Method

It is very important that you decide how you wish your stock value to be calculated and set this here.

- **Last price paid** – will update the stock value based on the latest posted purchase invoice for the stock item.
For example, if there are 20 items in stock, 10 were purchased last week at £10 and 10 were purchased this week at £20, the stock value would be £20.
- **Average price** – will update the stock value based on an average of the posted purchase invoices for the current stock being held.
For example, if there are 20 items in stock, 10 were purchased at £10 and 10 were purchased at £20, the stock value would be £15.
- **Standard price** – the system will not update the stock value, it must be manually entered and maintained by the user(s).
- **Average inc Build** - When a stock item is built, the stock value is updated to take into account the stock value of the child items.

Include Overheads

- This option is now deprecated and does not affect how stock value is calculated, irrespective of whether it is enabled or disabled.

Include Adjustments in Average Price Calculations

If enabled, the system will include any manually entered stock value figures added from the stock adjustment screen. This option will also be used if using the 'Build' items functionality.

If disabled, stock adjustments will not impact the stock value calculation.

3.3 Sales Tab

NEW ORDERS

Invoice address as default

- Enabled – the first address on the company record marked as address type of "Invoice" will be used as both the standard invoice address and the standard delivery address. Other preferential options will be ignored.
- Disabled – the first address on the company record marked as address type of delivery will be used by default.

Proforma Order Type

This option determines what type of sales orders are created by default for customers who are marked as Proforma Customers:

- Sales Order – orders will be created as sales orders, stock will be assigned and the order will appear in the relevant stage in Sales Invoice Manager (e.g. Staging, Awaiting Stock).
- Pro-Forma – orders will be created as Pro-forma orders, stock will be assigned and the order will be placed in the Manual Hold stage of Sales Invoice Manager.

- Quotation – orders will be created as quotes, stock will not be assigned and the orders will be visible under the [\[CRM | Opportunities \(Quotes\)\]](#) screen as well as in the relevant Quotations stage in Sales Invoice Manager.

GENERAL

Take full payment

- Enabled – irrespective of whether the order is 100% fulfilled or not, prepayment orders will have the full sales order total payment taken, while account orders will be invoiced in full for the sales order total.
- Disabled – if the order is not 100% fulfilled, prepayment orders will only have payment taken for the total of the assigned stock, while account orders will only be invoiced for the items sent on a part shipment.

Include Backorder in Run To Zero calculation

This option determines whether existing, unallocated items are taken into consideration when trying to produce a new sales order for a Run To Zero stock item (as the system won't allow Run To Zero items to be added to a sales order if no stock is available).

- Enabled – If the option is enabled, the system will factor in any outstanding, unassigned stock on existing sales orders. For example, if the Run To Zero item had 5 available but also had 5 unassigned to sales orders (5 on backorder) then the sales operative would be prevented from adding the stock item to a new sales order because there is only enough stock to fulfil the backorders.
- Disabled – if the option is disabled, the system will ignore any outstanding, unassigned stock on existing sales orders. For example, if the Run To Zero item had 5 available but also had 5 unassigned to sales orders (5 on backorder) then the sales operative would not be prevented from adding the stock item to a new sales order.

REQUIRED FIELDS

Keycode required

If enabled, the user must assign a keycode to the sales order before they are able to save it.

Sales source required

If enabled, a sales source will be required before the user is able to save a sales order.

Branding required

- Do not require – does not require a brand to be specified before saving sales orders.
- Sales Orders only – requires a brand to be specified on Sales Orders only before users can save them.
- All (Sales, Proforma, Credit Notes) - requires a brand to be specified on sales orders, proforma orders and credit notes before users can save them.

PRICING

Action if price is zero

Determines how the system will behave if a user tries to save a sales order which has a stock item where the sell price is set to 0

- None – the system will allow users to save sales order.
- Warning – the system will display a popup to warn the user, but the user can accept the warning and save the sales order nonetheless.
- Error – the system will not allow the user to save the sales order.

Warn if price is changed

If enabled, the user will receive a popup warning when trying to save a sales order where the prices the customer is entitled to have been manually changed on the sales order. The user can accept the popup and save the sales order nonetheless.

Lock Sales Order Prices

If enabled, the prices on sales orders will be locked once the sales order is saved. If the sales order is edited in the future, users will not be able to change the prices of the items listed.

Minimum Order Value

If an amount is specified here, then users will be warned if trying to save a sales order where the net sales order total falls below this figure.

Sell Prices are Net

Controls whether sell prices in the system are represented in Net (option enabled) or gross (option disabled).

Force sales order lowest price

- Enabled - the system will use the lowest price from all applicable prices for an item that the customer is entitled to.
- Disabled - the system will follow a pricing hierarchy when working out what price the customer will pay.

Note: Do not tick if using multi-currency. With this option enabled, the system will attempt to sell stock at the lowest value without taking currency into consideration.

Compound Discounts

- Enabled – customers will receive all discounts available to them.
- Disabled – customers will not receive the total sum of all discounts given, and instead will receive only one discount.

Note: Which one discount the customer receives when Compound Discounts is disabled depends upon the use of the Force Sales Order Lowest Price setting as to whether the customer receives the best price with the most discount or the price determined by the discount hierarchy.

Minimum Sales Order Margin

If a percentage is specified here, then users will be warned if trying to save a sales order where the order line margins and/or total sales order margin fall below this figure.

DELIVERY

Delivery Date (Release Early)

The number specified here depicts how many days prior to the sales order's delivery date the order will be released from the Awaiting Date Stage in Sales Invoice Manager.

Part Ship Period

The number of days a part fulfilled invoice will stay in Awaiting Stock until the fulfilled stock items are automatically released for processing as a part-shipment.

Delivery date (put in awaiting date)

Orders will be automatically put in Awaiting Date in Sales Invoice Manager if the delivery date is more than the number of days specified here in the future.

Delivery date (add to default)

Adds the number of days specified here to the system default delivery date (system default delivery date is order date plus 1 day, i.e. next day).

Delivery Date (cheque clearance)

If the payment added to a sales order is cheque, the system will increase the delivery date by the number of days specified here.

MANUAL BO/PO

Allow auto book-in of BO/POs

Controls whether stock can automatically be booked into the system for back order purchase orders without the need for users to manually create and complete a delivery note. The option can be configured to:

- None – Never allow stock to be automatically booked in.
- Allow for all – allow stock to be automatically booked in for all BO/POs.
- Direct to customer POs only – will only allow stock to be automatically booked in for BO/POs being sent directly from the supplier to the customer.

Assign stock to Dropship if available

- Enabled – If a stock item is marked as a Dropship item, but you have enough available stock to fulfil the order(s), the system will assign the available stock to the sales order.
- Disabled – the system will ignore your available stock when a customer orders a Dropship item. Available stock will not be automatically assigned to the order and a BO/PO should be raised.

Deliver to Site

If enabled, this option will set the delivery address for non-direct to customer purchase orders as the address specified against the Site the goods are being ordered to, as per the Site details in [System Data | Sites]. If disabled, the delivery address for non-direct to customer purchase orders will be set to the company address as specified under Company Details in [System Values | General].

3.4 Purchasing Tab

PRICES

The first four options update the buy price on the stock item, or for the supplier associated with the stock item, either when you save a purchase order or purchase invoice. This means that the latest buy price is held against the stock item.

Purchase Prices are Net

Control whether purchase prices are Net (default) or Gross.

Purchase Discount Net

Control whether purchase discounts are Net (default) or Gross.

Lock Purchase Order Prices

This is used when you don't want the prices on a purchase order to be changed once saved, for example if you negotiate special prices with your supplier.

REORDERING

Stock Reordering Base Value

Determines what the Reorder Report bases the suggested reorder quantities on, either Reorder Qty or Safe Level recorded against stock items, or based on nothing (i.e. no suggested reorder quantities will show).

Round to Reorder Multiple

Controls whether the reorder multiples recorded against stock items are used to calculate the suggested reorder quantity on the reorder report (enabled) or not (disabled).

Use Backorders in Calculations

Controls whether back order quantities are taken into consideration when suggesting reorder quantities on the reorder report or not.

SAFE LEVELS

Max number of months sales to assess

The number of months sales to be taken in consideration when performing a re-assessment of safe levels from the Reorder Report screen.

Note: We usually recommend to set the system to assess quite a few months' worth of sales data (e.g. 12 months) so that any fluctuation in seasonal demand is evened out. This is so that if you perform a safe level reassessment during or immediately after a seasonal busy

period for example, the system won't be setting your safe levels to an unrealistic high level based on the last month or so only, which would be unsuitable during quieter periods.

Options

Using the options following on from the above, you can dictate what the system takes into account when reassessing safe levels, for example if it should look to factor in back order figures and credit notes. In addition, it allows you to choose whether to assess safe levels for items currently with a 0 safe level.

3.5 Accounts Tab

MISCELLANEOUS

Monthly Debt Periods

- Enabled – Debt periods are represented by calendar month.
- Disabled – Debt periods are represented by 30-day blocks.

Future Payment Days

The value input here limits the number of days in the future any payment transaction can be posted into the Nominal Accounts. The recommended default is 14 days.

Xero Integration

Although the Xero integration and configuration are configured in the Accounts section, this toggle will enable the integration to be used and configured when switched on. If the toggle is disabled, you will not be able to use or configure Xero integration on your Khaos Control Cloud account.

SALES

VAT based on delivery address

- Enabled – VAT inclusion or exclusion on sales orders will be calculated based on the delivery address.
- Disabled – VAT inclusion or exclusion on sales orders will be calculated based on the country specified against the company record.

PURCHASES

Purchase invoice created from Purchase Order (or Delivery Note)

Controls whether purchase invoices are created when saving the delivery note (disabled) or when saving the created Purchase Order (enabled). If the purchase invoice is raised from the delivery note, any discrepancies or differences in the items delivered compared to the items ordered will be taken into consideration when the purchase invoice is created. If the purchase invoice is raised solely based on the purchase order, any discrepancies in the quantities or items delivered will not be taken into consideration.

Create purchase invoices

When this option is enabled, it will create purchase invoices based on the previous option (either from delivery notes or from purchase orders). If the option is disabled, purchase invoices will not be automatically created by the system, and posting purchase invoices must be done via the SP Ledger.

3.6 Companies Tab

GDPR – ANONYMISATION OPTIONS

Anonymisation Data

The text input here is used to overwrite any identifying details on company records when anonymised.

Minimum Days Since Last Order

If a user attempts to anonymise a customer who has a sales order dated within the past number of days specified here, they will be unable to do so. Only customers who have had sales orders prior to the specified time period can be anonymised.

Anonymise Company Code

- Enabled – The company code will be anonymised in addition to any identifying data when a company is anonymised.
- Disabled - The company code will not be anonymised at the time of anonymisation.

Anonymise Other Ref

- Enabled – The company code will be anonymised in addition to any identifying data when a company is anonymised.
- Disabled - The company code will not be anonymised at the time of anonymisation.

Company Debt Handling

This dropdown function determines what happens when a user is trying to anonymise a customer who has outstanding debt. The system can be set to prevent or warn users anonymising customers with a debt amount higher than specified in the following option, or alternatively it can allow anonymisation regardless of any outstanding debt and the value of it.

Anonymise Debt Value

The value specified here works in conjunction with either the prevent or warn functions from the previous option.

GDPR – DATA HOLDING OPTIONS

Holding Data

The text input here is used to overwrite any identifying details on company records when the Hold Data flag is set against the company, contact or address.

Held data is removed from hold by new Sales Orders

- Enabled - Khaos Control Cloud will allow new sales orders to be created for companies on data hold and upon creation, will automatically remove a company level Hold against the company.
- Disabled – Users will be prevented from creating new sales orders for companies on Data Hold.

Held data is removed from hold by new Purchase Orders

- Enabled - Khaos Control Cloud will allow new Purchase orders to be created for companies on data hold and upon creation, will automatically remove a company level Hold against the company.
- Disabled – Users will be prevented from creating new purchase orders for companies on Data Hold.

4. Data Import

Once you have gone through the System Values configuration and set up any required System Data options, you may want to import your existing stock or customers and suppliers into Khaos Control Cloud. The Data Import facility enables you to do this by creating a template table for you to populate with your existing Stock, customers and suppliers or sales orders, and once filled in allows you to import this information back into Khaos Control Cloud.

4.1 Template Generator

The template generator is found under [\[System Setup | Data Import\]](#). Click on Generate Template and choose which template you would like to generate. Once you have done this, you will have the template generator screen with a four-step process. Each step contains field names to be added to your generated template, which will become column headings on the table upon download ready for you to populate with information.

- **Step 1** – The fields in this step are compulsory and will be automatically added to your generated template. This information is also required upon import, so those columns must be present and filled in on the file imported into Khaos Control Cloud.
- **Step 2** – The fields on this screen are optional but recommended for a more comprehensive data import. To add any of these fields/columns to your template download, enable the toggle on the righthand side of the row you want to add. If you wish to add all the recommended rows, you can simply use the “Select all recommended?” toggle to the top right of the grid.
- **Step 3** – The fields on this screen are also option. Again, you can either enable the toggle on the row of the field/column heading you would like to add to your template or use the “Select all optional?” toggle on the top right of the grid.
- **Step 4** – This step gives you a final overview of all the fields from the previous three steps which will make up your template. If you are happy with the overview, you can click Generate Template to download the CVS copy of your file.

There are PDFs available for each template which include the title, field name and description for the importable fields to assist in compiling the information and outlines what type of

information is required in each field, for example VAT on Stock Item Import is depicted by a number between 1 and 6, and the PDF specifies what these are.

4.2 Compiling your data import file

The generated template will usually download as a .txt file. One way to fill in the data import file is to copy and paste the downloaded column headings into a spreadsheet as column headers. Once the column headings are in place, you can populate the rows on the spreadsheet with the relevant information.

4.3 Importing your Data

Once you have compiled your data ready for import, you will need to ensure it is saved as a “Text (Tab Delimited)” file in order to import the information back into KCC. Once saved in this format, log in to KCC, go back to [\[System Setup | Data Import\]](#) and select “Import your data”.

- **Step 1** - You can drag and drop your import file or browse your local resources to find and select the file to upload. You will also need to specify which type of data you are importing (Stock, Customer or Sales Order) on the right-hand side of the screen, and we recommend previewing the data prior to import. Finally, there is a “Calculate” button which will total the number of rows KCC can read on the import file, which is a useful indicator to know that the system can see as many lines as you had on your import file.
- **Step 2** – KCC will verify the import file to let you know if the file is suitable for importing, along with listing the column headers seen within the file and highlighting in green the valid column headers.
- **Step 3** – This step is for the recommended data preview. The system will run a dummy import to check the data and will feedback to tell you how many rows the import preview was successfully able to import.
Note: *At this stage the data is not yet imported into your KCC system, you will need to continue to Step 4 in order to fully import your data.*
- **Step 4** – The final step will be to fully import the data. Once you have done this, there will be no more click through options and the system will simply confirm how many items have been successfully imported. The data import screen can then be closed using the red cross button on the top right of the screen.

Once your data has imported, you will be able to view or find the imported information on the relevant screens within the system, for example from the Stock Item screen.

Notes:

1. *Any price fields on the stock import should be entered as a numerical figure, and not in a currency format.*
2. *It's important to consider which order you would like to import information in, because some of the data import facilities will need to link to information already in Khaos Control Cloud, for example if you want to link your suppliers to stock items you would need to have imported your supplier data prior to importing your stock items.*

Do you want to know more?

Click through to [Khaos Control Cloud](#).