

Khaos Control Cloud Trial Guide

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1. Getting to Know Khaos Control Cloud

During the login process, you will notice that there is a choice of two systems that you can access:

Live System – This is your own, personal blank database which allows the setup and configuration of Khaos Control Cloud to be tailored to your business practices and requirements. This is the database you will continue to use if you subscribe to Khaos Control Cloud. If you decide not to take up a subscription, data will be removed 30 days after your trial period expires.

Demo System – This database has been loaded with sample data so you can investigate how the system works and get a feel for how Khaos Control Cloud can help you and your business. Below are a few areas of the demo system which you may wish to explore during your trial period.

2. Help is at Hand

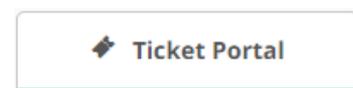


Khaos Control Cloud comes with a wealth of in-built Help functionality which can be accessed by clicking on the yellow question mark button in the top right-hand corner of the application, or by clicking on the Help button at the bottom of the Navigation Bar.

The Help menu is 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.
- A free text box for you to search for a specific task unrelated to the page you are viewing.

If you encounter a problem, you can raise a support ticket straight from the dashboard within Khaos Control Cloud for our Technical Support team to investigate. Click the Ticket Portal button on your dashboard and raise a ticket via the 'Tickets' menu at the top.



There are also tooltips which display when you hover over options and describe what the option does.

3. Support and Guidance

At Khaos Control Cloud, we are on hand throughout your trial period to help you understand how the system can help your business and ensure that you get up and running as quickly as possible.

In addition, we have a comprehensive range of resources and tools:

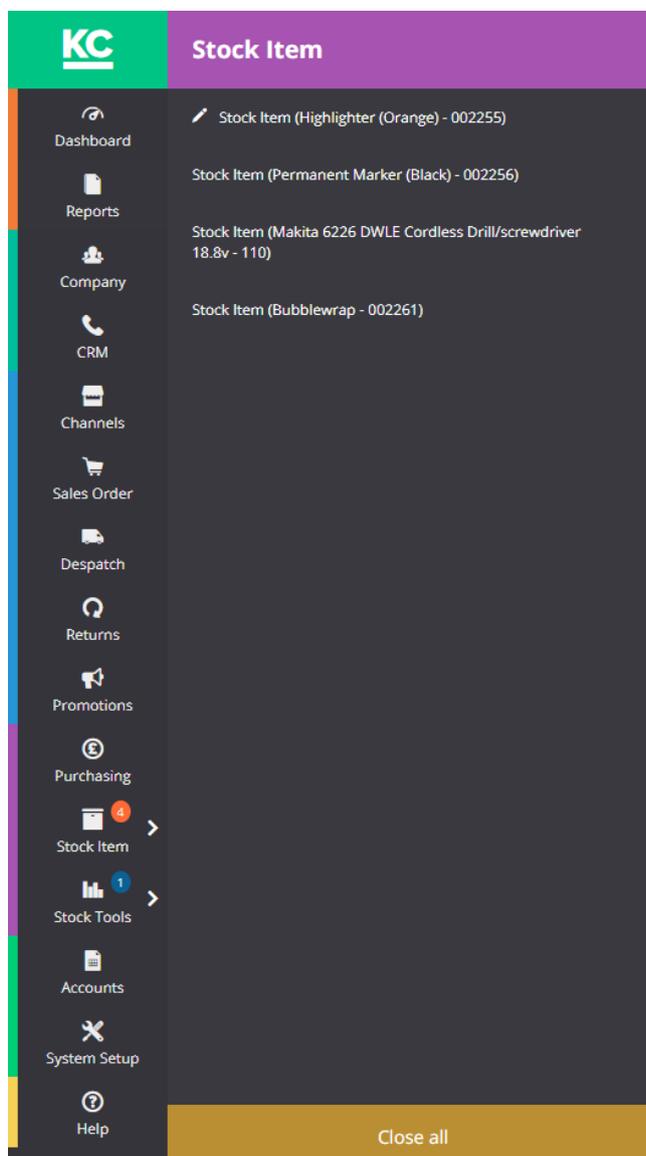
- Explainer Videos on the [KCC Knowledgebase](#). These are a great way to get to know Khaos Control Cloud and are regularly updated as new features arrive.
- [Our KCC updates blog](#). Every time a new feature is added to Khaos Control Cloud, it will be covered on our blog to ensure that you are up to speed with our latest developments.

- ‘What’s New’. Whenever Khaos Control Cloud is updated, this area on the application dashboard will update with an overview of what has changed and why. This part of the application also links you through to recent blog posts.
- The [Support Portal](#) on the Khaos Control Cloud website contains How To and Explainer videos to help you get the most out of your Cloud ERP system.

4. Exploring the Demo System

If you are new to Khaos Control Cloud, it is worth logging into the Demo system and reviewing some of the core functionality that is available throughout the application. The demo account is fully functional and any changes made here will not affect your live system.

Navigation Bar



The Navigation Bar is at the heart of Khaos Control Cloud, providing quick and easy access to every element of the application.

Clicking on an icon will open a new instance of that functionality within the application, for example clicking Stock Items will open the Stock Item List.

The Navigation Bar also allows you to identify how many screens you have open and what you are currently editing.

If you have active screens within an area of the Khaos Control Cloud, a number will appear next to the relevant icon on the Navigation Bar. Clicking on the arrow will extend the Navigation Bar allowing you to move between the active screens.

The colour of the number is also important. If you have windows open in a read only state, the number will appear in blue. If you have a screen open which is currently being worked on (for example creating a new record or editing an existing record), the number will appear in orange. A pencil icon will also be visible on the extended Navigation Bar to show you which record or records is being worked on.

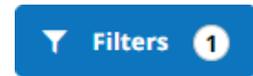
Filters

Filters allow you to drill into the detailed information to locate the specific information you are looking for.



The Filters button (available above most system grids) allows you to refine the data that is returned.

When filters are being applied to the grid, the number depicted within the filter button will let you know how many filters are currently in use on this screen.



What you need to know when setting and using Filters

Toggles:

Toggles allow you to turn a filter on and off with tri-state toggles having an 'inactive' state. The options are:



Standard - The filter is on.

Tri-State - Only show these items.



Standard - The filter is off.

Tri-State - Do show these items.



Standard - Filter is disabled.



Tri-State - Filter is inactive and all items will be included in the results.

Wildcards:

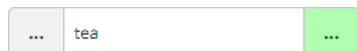
Wildcards allow you to search for part of a word or phrase, for example:



All results will **contain** the search term.



The results will **end with** the search term.



The results will **begin with** the search term.



The results will be an **exact match** for the search term.

Pinning filters:

Some filters are pinned to the bar above the grid as standard, so they are readily accessible. However, if there are filters that you use on a regular basis, these can be pinned to the bar above the grid; just click on the 'pin' button adjacent to the filter that you want to pin.



Indicates a System Pinned filter.



Indicates that the filter can be pinned.



Indicates that the filter has already been pinned.



Any pinned filter will have a pin icon to the left-hand side of the filter name on the bar above the grid. If you want to remove the filter, click this pin icon.

Grids

Grids allow you to sort, search, select and work on data quickly and easily. Data is displayed within the visible grid depending on the filters that you have defined.

Grids have many powerful features including:

Searching:

GENERAL		
STOCK CODE	DESCRIPTION	
<input type="checkbox"/>		makita
<input type="checkbox"/>	110	Makita 6226 DWLE Cordless Drill/screwdriver 18.8v
<input type="checkbox"/>	104	Makita 6501 6.5mm High Speed Rotary Drill 240v
<input type="checkbox"/>	102	Makita 6300LR 13mm Angle Rotary Drill 240v

You can click into any column within the grid and start typing to search for specific records.

In this example, we have started typing 'station' into the Company Name column of the Customer screen and the application has narrowed down the data accordingly.

Sorting:

POST CODE
BA4 3DH
BH9 1DU
BL4 0EJ
BN1 6JA

Clicking on one of the grids column headings will sort the data in the grid **descending** based on the alpha-numeric data held within the field.

Clicking again will sort the data **ascending**.

A third click will reset the grid.

Focusing:

To update or work with a specific record using the 'Actions' button in a screen, you will need to focus on it.

	URN	COMPANY NAME	TOWN
<input type="checkbox"/>			
<input type="checkbox"/>	00123	Mrs Joanna Smith	LEICESTER
<input type="checkbox"/>	00126	Mr Malcolm Smith	LIVERPOOL
<input type="checkbox"/>	00128	Dr Simon Smith	LOUTH

To do this, click once on the relevant line in the grid and you will get two highlights to indicate the record that is being worked on; a green highlight in the gutter to the left-hand side of the grid and a blue highlight on the specific cell of a record you have focused on.

Selecting:

You may also need to select a record or records, for example if you want to export data from Khaos Control Cloud, for printing documentation or to move multiple invoices between stages in Sales Invoice Manager. This can be done in a few different ways depending on the records you want to select.

<input type="checkbox"/>	00123	Mrs Joanna Smith	LEICESTER
<input checked="" type="checkbox"/>	00126	Mr Malcolm Smith	LIVERPOOL
<input type="checkbox"/>	00128	Dr Simon Smith	LOUTH
<input type="checkbox"/>	00129	Mr Lee Smith	LEEDS
<input type="checkbox"/>	00739	Exeter Police Headquarters	EXETER

To select a single record / multiple non-adjacent records

There are two available methods for selecting single or non-adjacent records:

- Press and hold [CTRL] on your keyboard and single-click on the record(s) you want to select.
- Alternatively, tick the check box to the left of the record in order to select the row(s).

To select multiple, adjacent records

Single-click on the first record you want to select. Press and hold [SHIFT] on your keyboard and single-click on the last record you want to select.

Grid Options:

Every grid also has a range of additional options, accessed by clicking  the button above the grid itself. The options will vary depending on grid that is being used.

Export as: You can choose to export as a CSV, JSON or XML document. This will create and download the file type selected of the data within the grid, based on the selected rows within the grid or if no rows are selected, based on the filters that are currently being applied.

Clear Selection: deselects any currently selected records within the grid. Alternatively, you can press [CTRL + Q] on their keyboard.

Total options: allows you to alter how information is displayed on totals bars, for example showing totals for all records or totals per page. You can also swap between viewing totals or averages as required. Totals bars are visible at the bottom of relevant grids, for example on the Sales Order List screen.

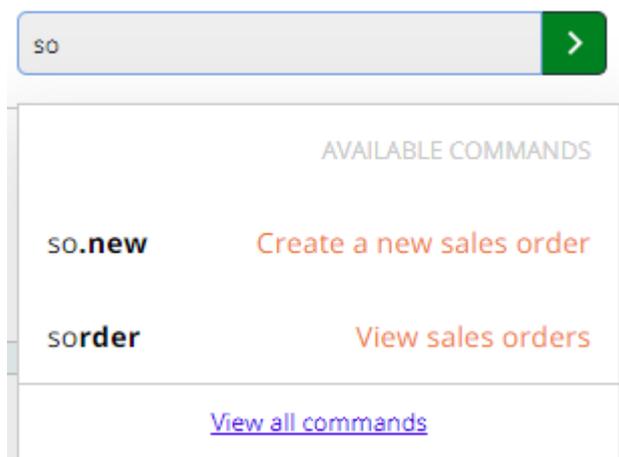
Show Columns: allows the user to hide columns within the grid. This can be useful if there are fields within Khaos Control Cloud that you do not use, and you want to simplify the user interface.

Apply Value Range: when in edit mode allows you to update all the selected records with the same value in one go. To do this, you need to select the records you want to update and ensure that you are focused within the relevant column within the grid. This can be useful in scenarios such as creating sales or purchase orders and you want to update the quantity field to be the same amount for each stock item.

Highlight by Value: allows you to quickly select all records that have the same value within a field, for example selecting all customers within the same town. To do this, you will need to ensure that you are focused within the relevant column within the grid.

Quick Command Entry

Different users interact with software applications in different ways. Those users who prefer using their keyboard can make use of the Quick Command Entry field at the top of the screen. This allows you to start type in commands to access screens or perform actions within Khaos Control Cloud.

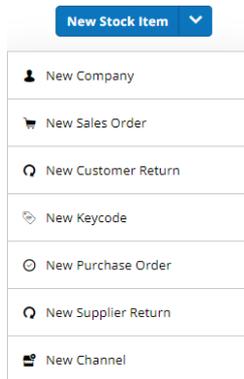


In this example, we have entered 'so' into the Quick Command field and the application is suggesting potential options that match our criteria. Clicking on one of the options will perform that action, in this case either create a new sales order or view the sales order list.

If you know the full command, type this in full and press [ENTER] on your keyboard or click the adjacent arrow to apply the command.

You can view a list of the command shortcuts by clicking the link at the bottom of the list or by visiting your Admin Panel.

New Document Button



The New Document button is at the top of the screen and by default the new document is relevant to the screen you are currently in.

Clicking the arrow to the right-hand side of the button allows you to select a different document, so you are never more than two clicks away from creating all your important documents within Khaos Control Cloud.

The Barcode Settings



This button is a shortcut to your Barcode Settings where you can enable or disable the barcode scanning functionality within Khaos Control Cloud.

The Site Button



This button allows you to see what stock control site you are currently in and swap between the stock control sites you have configured in Khaos Control Cloud to view stock level information and to process orders against one of your other warehouses.

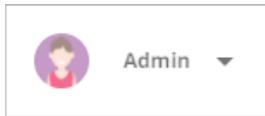
This button allows you to quickly swap between stock control sites you have configured in Khaos Control Cloud to view stock level information and to process orders against one of your other warehouses.

The Notifications Bell



In the top right-hand corner of the screen, the Notification Bell highlights any actions that need your attention. This could be because we have sent you an update or because you have printed a document which is ready for download. If you have no unread notifications, the icon will appear in grey.

The User Portal



The User Portal is available from the top right-hand corner of the screen and allows users to perform a range of tasks, depending on the security permissions you have set against them.

View the list of Keyboard Shortcuts: provides you with a popup of the core keyboard shortcuts which can be used throughout Khaos Control Cloud.

Need help: loads the Help menu for the screen you are currently on.

Contact Us: provides you with a contact form so you can send us comments, suggestions or to raise support queries from within Khaos Control Cloud.

Account Settings: opens a popup which allows you to perform multiple actions such as updating your password, turning Control Hints on and off, altering font sizes or updating your Khaos Control Cloud avatar.

Sign Out: allows you to sign out of the current instance of Khaos Control Cloud.

The Actions Button

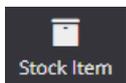


The Actions Button will appear in the top right-hand corner of various screens within Khaos Control Cloud. It allows you to perform a range of different actions depending on the area of the system that you are accessing, including printing documents, opening a related screen, creating payments etc.

5. Where to Start

Now that you know how to get around Khaos Control Cloud, where should you start with your demo system?

Stock Items

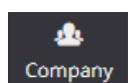


To get a good feel for how Khaos Control Cloud can help your business, we suggest you start with Stock Items.

1. Click on the **Stock Item** button on the **Navigation Bar**.
2. Click into the **Description** column and type in **Ski Hat** to search the stock item records.
3. Open the stock item's record by double-clicking on it within the grid.
4. Navigate through the stock item tabs, taking note of:
 - a. The **Properties** tab which includes the core details of the stock item, including:
 - i. The Stock Code
 - ii. Description
 - iii. Stock Type

- iv. Base Purchase and Sales prices
- v. Minimum, Safe and Reorder Level
- vi. Location
- b. The **Options** tab which allows you to fine tune the properties of individual stock items, including:
 - i. Whether the stock item has or will become discontinued.
 - ii. Whether or not the stock item is a non-physical or service line item (e.g. for crediting a customer when no physical stock item is involved).
- c. The **Bar Codes** tab which allows you to set multiple reference codes against a single stock item. It can be used to record traditional barcodes such as EANs, but it can also be used to store references for other purposes too, for example SKU references for various sales channels such as the Amazon SKU or ASIN. Each barcode can have its own type which can be configured in System Data.
- d. The **Suppliers** tab on which you state the suppliers that you can purchase the stock item from, along with the supplier specific price and part number.
- e. The **Relationships** tab which allows you to indicate whether this stock item is made up of other products. Khaos Control Cloud provides two different types of stock relationship:
 - i. **Move With (Packs)**: sometimes referred to as bundles or promotional sets. Packs are a way of selling a bunch of products at a set price where the individual parts of the pack are grouped together for sales and picking. The parent (or Pack item) is not stock control; instead when it is added to a sales order, it will also pull through and display the child items. These are then picked individually and bundled together at the point of despatch.
 - ii. **Builds**: unlike Packs, Builds are stock controlled and don't pull through or display child items on sales orders. Instead a build item is 'built' in advance from its component parts. This built item is then sold as though it were a normal stock item with its own stock level.
- f. The **Images** tab on which you can link your stock items to pictures.

Customers and Suppliers

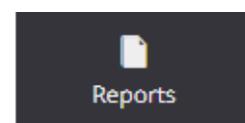
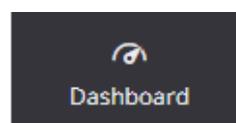
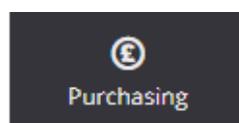
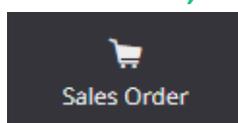


The next area to review are the customer and supplier records within Khaos Control Cloud. These can be found within the Company screen within the application. Some of the options discussed below only relate to customer records.

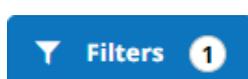
1. Click on the **Company** button on the **Navigation Bar**.
2. Click on the **Filters** button and use the **Company Name** filter to search for **Computing Department**.
3. Click **Go** to return the search results.
4. Double-click on the company
5. Open the company's record by double-clicking on it within the grid.
6. Navigate through the company tabs, taking note of:
 - a. The **General** tab which includes the core details of the company, including:
 - i. Their Code (URN).
 - ii. Name.

- iii. The Company Class that the company belongs to.
- iv. Whether or not the company is a supplier.
- b. The **Financial** tab which allows you to denote key financial information such as:
 - i. Whether or not the company is treated as an Account company, along with their credit terms and credit limit.
 - ii. The country in which the company is based.
 - iii. The currency in which you trade with the company.
- c. The **Address & Contact** tab which allows you to keep track of the different addresses and people that you deal with at the company in question. Each company within Khaos Control Cloud **must** be linked to an invoice address.
- d. The **Customer Services** tab which, based on the selected filters, will display all sales orders that a customer has placed. Orders with a **purple** highlight in the status column are classed as being active orders which are still being processed within the system.
- e. The **CRM – Free Text Notes** tab which allows you to record:
 - i. A general note about the company.
 - ii. Default notes to appear on the following documents:
 - Picking List.
 - Invoice.
 - Statement.
- f. The **CRM – Communication Log** tab which details all communication that users have logged with the company. New communication records can also be created from here.
- g. The **Statement** tab on which you can view all invoices, payments and credit notes associated with the company. From here you can also create payments and manage the allocation of these to sales and purchase invoices.
- h. The **Structured Pricing** tab which shows the details of stock items that a customer received special prices on, including quantity price breaks.

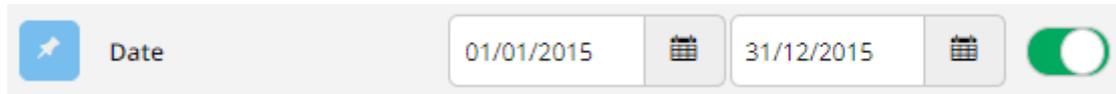
Sales Orders, Purchase Orders and Reports



The Khaos Control Cloud demo system contains some historical transactional data to give you an understanding of how sales orders and purchase orders feed into the built in Dashboards and Reports.



In the Sales Order or Purchasing screens, use the filters button and set the date range to be from 01/01/2015 to 31/12/2015 and click the Go button. You may also wish to experiment with the other filters to see the level of detail you can drill down into when filtering your data.



Double-click on some of the records to view the relevant documents such as sales orders or purchase orders.

Things to Note in Sales Orders

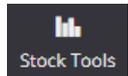
Khaos Control Cloud's sales order process provides immediate access to:

- The latest stock level information
- All current promotions, offers and customer special pricing
- Payment options
- Customer sales order history
- Address and contact information
- CRM data including the Communication Log

This ensures that you can enter and manage sales orders quickly and efficiently, guaranteeing that your customer enjoys an excellent and consistent experience.

Things to Note in Purchase Orders

Khaos Control Cloud helps you decide what to order, in what quantity and from which supplier whilst ensuring that you get the best possible price. With your purchasing process fully integrated into your business management solution, you will also benefit from improved customer service on back orders, without the need for laborious manual workarounds.



Stock Tools

Although you can create purchase orders manually, Khaos Control Cloud provides a full stock reordering report which can analyse your Safe, Minimum and Reorder stock levels, as well as your sales order commitments. This report can be accessed by clicking the Reorder Report option in the Stock Tools area of the application.

Things to Note about Reports

The reporting options within Khaos Control Cloud are broken down into two main areas; Dashboards and Reports.

Dashboards: are constantly updating charts and graphs configured via the Your Charts screen. Dashboards provide a powerful and visual representation of your business data.

Reports: are broken down into key areas and are highly filterable and allow you to gain an in-depth analysis of your business activity.

6. Starting to Use Khaos Control Cloud

Now that you have had a look at some of the key areas of Khaos Control Cloud, you should be ready to begin processing orders. Providing in-depth information on how to raise and process orders within the application is not possible within a simple setup guide, however our experience with new implementations has found that the following brief process flow will aid you in understanding the life cycle of a products journey through purchasing, goods receipt, sales and despatch.

- Create a new supplier
- Create a stock item
- Adjusting stock in – in case you already have them in stock (optional)
- Creating a purchase order
- Book the purchased items into stock
- Create a sales order
- Pick and despatch the sales order

As previously mentioned in this document, the Help menu provides detail on how to achieve all of these actions, either through the screen descriptions and hover hints, or through the How To videos.

However, if you need additional assistance you can contact training@khaoscloud.com to arrange training sessions to guide you any aspect of the application that you need help with.

7. Khaos Control Cloud in Your Business

Once you are ready to start using Khaos Control Cloud for your business, please request or refer to the KCC Setup Guide. This document will guide you through entering your own data into Khaos Control Cloud and configuring the options to suit your business needs.

8. Supporting the #KhaosFamily

We want to make sure that you get the most out of Khaos Control Cloud. You will already have been working with various members of our on-boarding team to help you understand how the product can help you and your business, but if you have any questions, please call or email us.

Do you want to know more?

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