

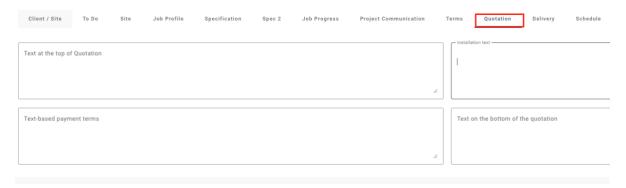
How to change Quotation text in KBBConnect

When creating a printable quotation in KBBConnect it is possible to add in default text to both the top and bottom of the quotation report, for example you may want to add some Terms and Conditions, or a foot note about the payment of deposits.

This document outlines how to change the 'Quotation Text' both for a particular job and how to set the default text - which can be customised separately for Kitchen, Bathroom, Item and Bedroom quotes.

Changing the quotation text for a specific project

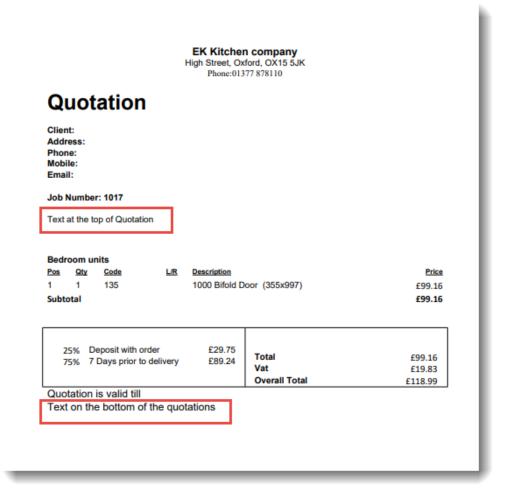
In the main Project screen highlight the relevant job and then along the bottom of the screen select the "quotation tab". Here you can change any of the quotation text for a specific job. You can see boxes to change the text at the top and the bottom of the quotation and also special installation text.



To view your completed quotation with the text changes, click on the relevant job and 'Open Quote' to open the main quotation view. Then from the left hand 'Tasks' menu click on the 'Preview Quotation' button to view the quotation report. Here you will see your modified text. KBBConnect will save all the changes automatically.

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Similarly, you can change text at the bottom of the quotation by entering it in the box highlighted as shown below.

How to change the default text for all future jobs

In order to change the default text select the 'Company Details' tab along the top of the KBBConnect main Project view.

Then select the 'Product Defaults' option on the left hand side of the window.

From here you can select the product name, Kitchen, Bathroom, Bedroom or Item Quote – each project type can have different quotation text allowing you greater flexibility for your quotations.

If you wish to change text at the top of the quotation, click on "**Text at the top of quotation**" and enter your text here. Similarly, to change the bottom text click on the "**Text at the bottom of quotation**" tab. These changes will be saved automatically into your KBBConnect and will appear for any **New** Projects that you create.

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We hope you found this document useful, and we'd like to know what you think of KBBConnect. To comment on this Quick Guide or anything else regarding KBBConnect, for help, or for information regarding on-line training courses, please contact KBBConnect Customer Support:

e-mail us at: info@smart-systems.co.uk

or

Telephone Number: +44 (0)1923 919 278

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