


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.



The screenshot shows the 'Quotation' tab selected in a navigation menu. Below the menu are four text input fields for editing quotation text:

- Text at the top of Quotation
- Text-based payment terms
- Installation text
- Text on the bottom of the quotation

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.

EK Kitchen company
 High Street, Oxford, OX15 5JK
 Phone:01377 878110

Quotation

Client:
 Address:
 Phone:
 Mobile:
 Email:

Job Number: 1017

Text at the top of Quotation

Bedroom units

Pos	Qty	Code	L/R	Description	Price
1	1	135		1000 Bifold Door (355x997)	£99.16
Subtotal					£99.16

25%	Deposit with order	£29.75	Total	£99.16
75%	7 Days prior to delivery	£89.24		
			Vat	£19.83
			Overall Total	£118.99

Quotation is valid till

Text on the bottom of the quotations

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.

Tasks	Product
	Kitchen
Company Details	Bathroom
Tradeplace Setup	Bedroom
	Items quote
Email	Terms
	Text at the top of quotation
	Text at the bottom of quotation
Job Progress	
Job State	Text at the top of quotation
Account Types	
VAT Rates	
Product Defaults	

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:

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or

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