

Customising your KBBConnect Documents

Using KBBConnect you can quickly and easily reformat the built-in quotation, invoice and dispatch notes in line with your company's standards. Also, you can create your own report templates for both dispatch notes and invoices and create any other template documents you currently use in your business.

This document will detail changes to the Quotation document. However, all of the features in these pages can also be applied to:

- Invoices
- Dispatch Notes
- External Documents
-

Changing the Content of your Quotation in KBBConnect

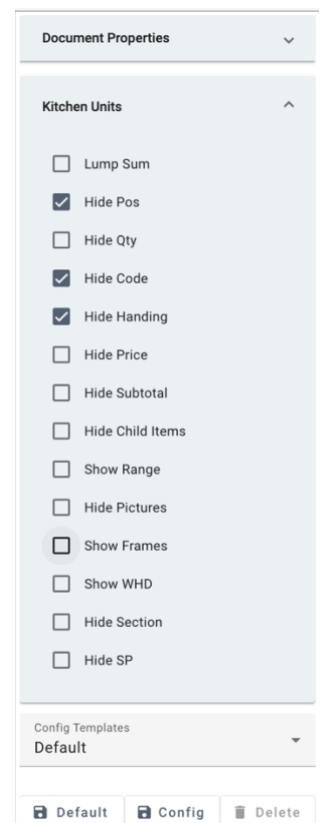
Should you want to hide certain information in some quotes, and keep it in others, it is not always necessary to change the template your documents are designed upon.

The KBBConnect Configuration options (to the right of the Quotation screen) allow you to display and hide information, according to your requirements.

For example, you may wish to hide sub-totals, item codes or even quantities for certain items or sections. All of this can be done at the click of a button using the KBBConnect Configuration panel.

If you wish the configuration options to be used as default then click the **Default** button at the bottom of the menu. You can also setup different templates using the **Config** button and give your template a name.

Should you wish to make other changes to your default quotation, for example changing the standard layout, adding pictures or additional text, such as a page of Terms and Conditions, it will be necessary to change the template. This is summarised in the following section.



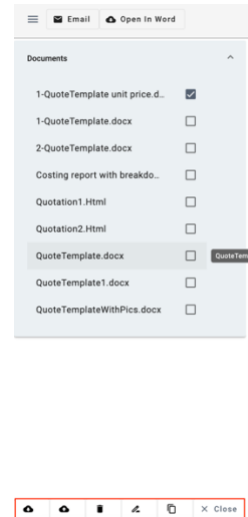
The screenshot shows the 'Document Properties' configuration panel. It has a dropdown menu at the top set to 'Document Properties'. Below it is a section titled 'Kitchen Units' with an expand/collapse arrow. This section contains a list of options, each with a checkbox: 'Lump Sum' (unchecked), 'Hide Pos' (checked), 'Hide Qty' (unchecked), 'Hide Code' (checked), 'Hide Handling' (checked), 'Hide Price' (unchecked), 'Hide Subtotal' (unchecked), 'Hide Child Items' (unchecked), 'Show Range' (unchecked), 'Hide Pictures' (unchecked), 'Show Frames' (unchecked), 'Show WHD' (unchecked), 'Hide Section' (unchecked), and 'Hide SP' (unchecked). At the bottom of the panel, there is a 'Config Templates' section with a dropdown menu set to 'Default'. Below this are three buttons: 'Default' (with a refresh icon), 'Config' (with a plus icon), and 'Delete' (with a trash icon).

Making Changes to KBBConnect Templates



There are three simple steps to amending your Quotation template:

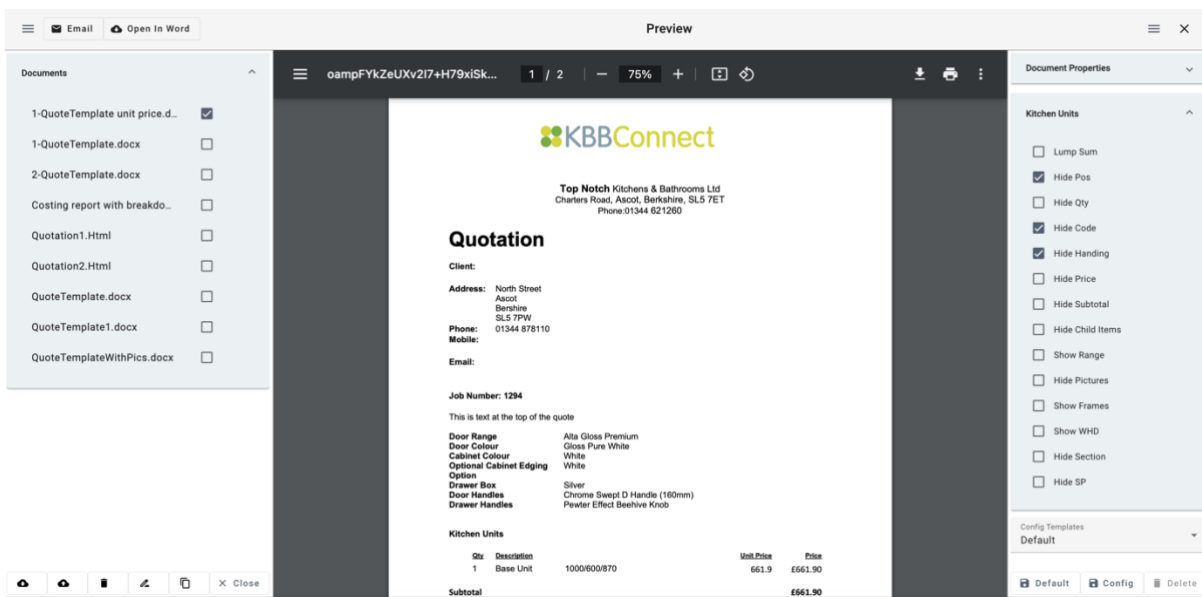
1. Download the template (1st button on the bottom) you wish to change from KBBConnect into Microsoft Word.
2. Modify the template by adding text, graphics, logos or tables.
3. When you have finished modifying the template, save it, and then import it back (2nd button on the bottom) into your KBBConnect for use as your main quotation template.



Follow the steps below to create your own customised templates.


Downloading the Document Template

1. In Project tab, click on the **Open Quote** button and select **Preview Quotation** in Basic tasks (left hand side menu).
2. The Preview Quotation window will open. The Template taskbar panel displays your current list of built in quotation templates and any templates you have loaded into the system yourself.

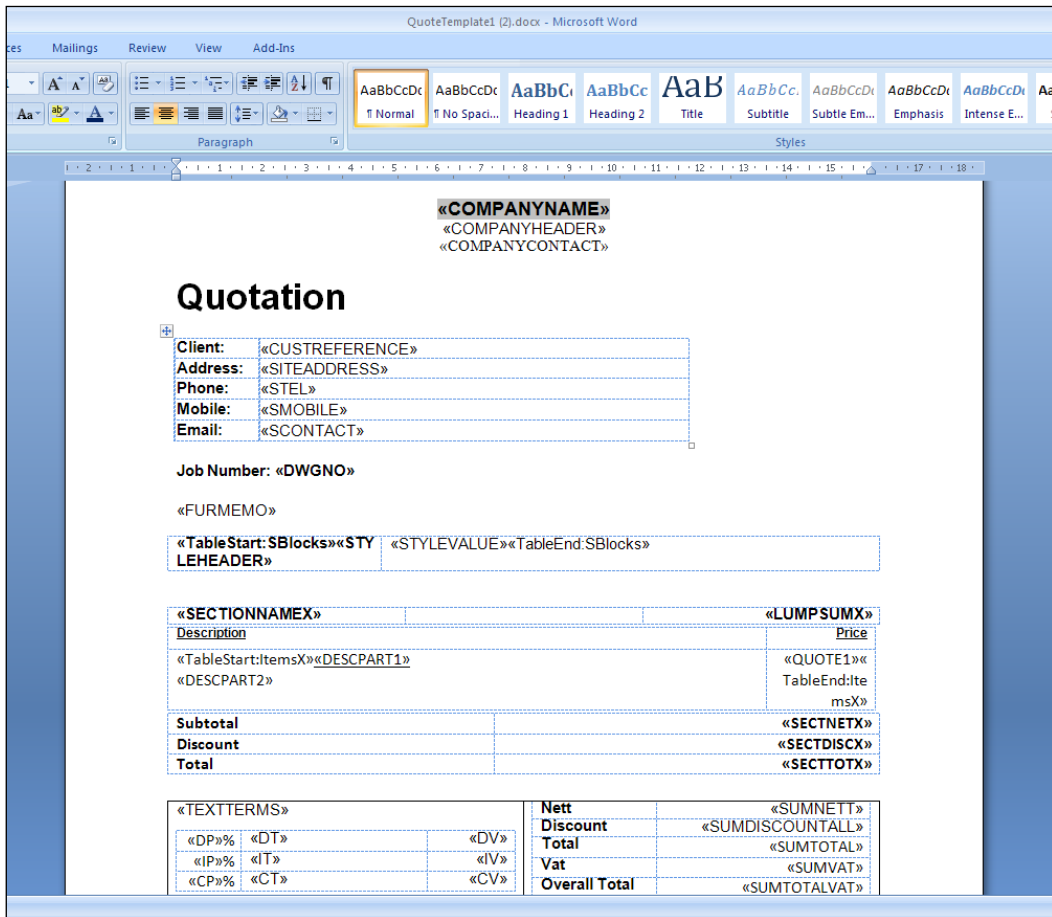


The screenshot shows a 'Preview' window with a 'Documents' panel on the left and a 'Document Properties' panel on the right. The main content area displays a quotation document for 'Top Notch Kitchens & Bathrooms Ltd'. The document includes client information, job number, and a table of kitchen units.

Qty	Description	Unit Price	Price
1	Base Unit	661.9	£661.90
Subtotal			£661.90

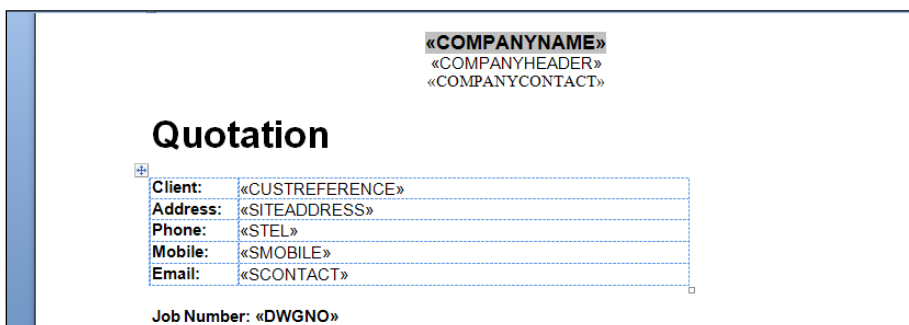
3. Select the template you want to amend and click on the  button.

The quotation will be downloaded into Microsoft Word, as follows:



Notice that the document has a number of words surrounded by chevrons: “<< >>”. These are called *Fields* and are used by KBBConnect to pick up the relevant information from your KBBConnect job, so that when you want to create a quotation all you have to do is select the Preview Quotation button.

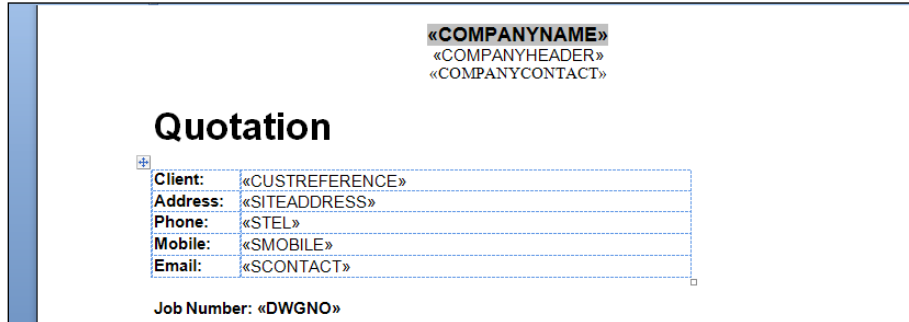
The fields in your KBBConnect template are essentially the same as *Merge fields* in Microsoft Word. When you click on a field, it becomes highlighted in grey, as shown below – **COMPANYNAME**.



Working with KBBConnect Fields to alter your quotation template

EXAMPLE 1 – Deleting fields from your quotation

The quotation below displays the customer’s name and address, followed by the telephone and mobile numbers and email address.



«COMPANYNAME»
«COMPANYHEADER»
«COMPANYCONTACT»

Quotation

Client:	«CUSTREFERENCE»
Address:	«SITEADDRESS»
Phone:	«STEL»
Mobile:	«SMOBILE»
Email:	«SCONTACT»

Job Number: «DWGNO»

The fields representing these are as follows:

Phone: «STEL»
Mobile: «SMOBILE»
Email: «SCONTACT»

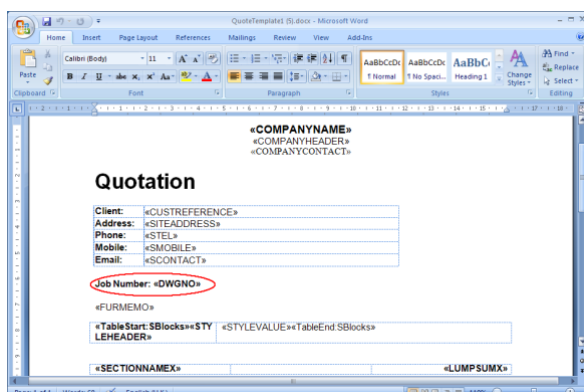
If you don’t want the telephone numbers on your quotation, highlight the word with your mouse and select the **DEL** key on your keyboard. This will remove the fields from your document.

Note: All KBBConnect templates are designed using a Word table. The borders are set in Word to invisible, so the document appears in a professional letter layout. If you want your template set out in a different way delete the table and insert the template fields according to your quotation design.

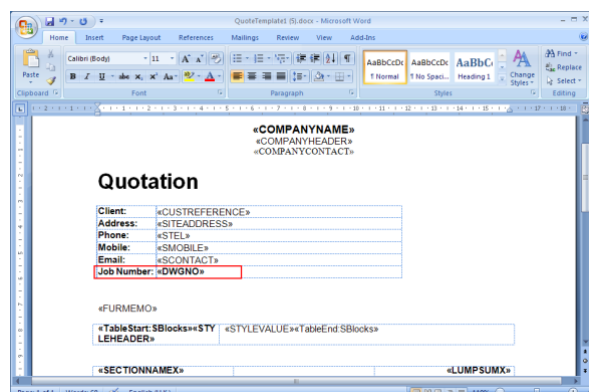
EXAMPLE 2 – Changing the position of a Quotation field

If you wish to have your sales order/ quote number displayed in a different place in your quotation, highlight the field reference «DWGNO» (including the field chevrons << and >>), and move it to the new location using Word’s Cut and Paste commands.

Before



After

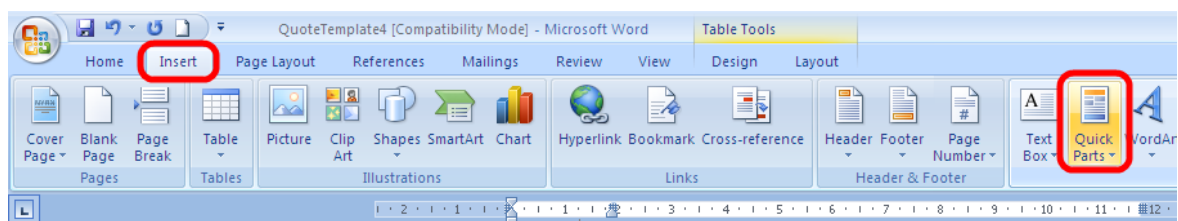


NOTE: A list of useful field references is included at the end of this document.

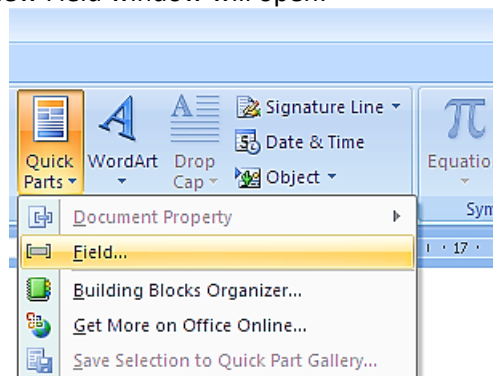
Inserting new fields into your template

To add new fields into your Word document template you will need to add fields as if you were creating a mail merge document, in MS Word 2007. This is done through the Word Quick Parts Gallery. For example, to insert the Nett Price field in your document:

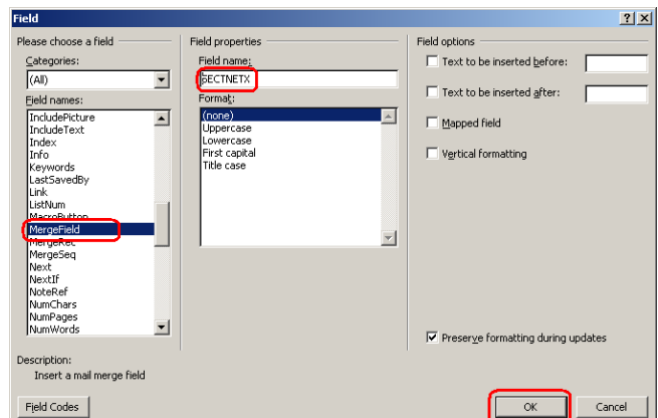
1. Position your cursor where you want the Nett Price to appear in your document and from the the Insert tab select the Quick Parts command:



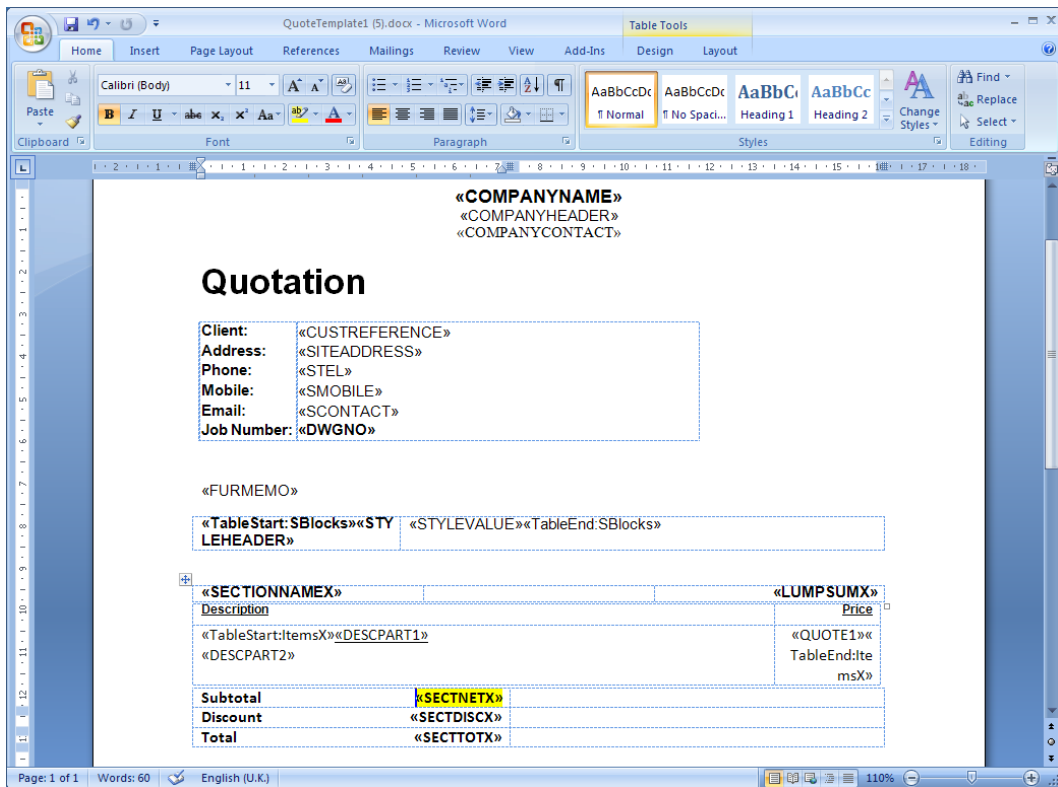
2. Select *Field...* from the drop-down menu and a new Field window will open.



3. Scroll down and select “MergeField” in the ‘Field names’ list, and in the “Field name” box type in the code name for the field you need for example the Nett Price which is “SECTNETX”.



4. Click on OK and your Nett Price field will appear in your document.



If you need further information about using Microsoft Word fields, more detail can be found at <http://office.microsoft.com/en-gb/word-help>

EXAMPLE 3– Repeating Items in your Quotation

In order to customise your document some fields will need to be repeated, for example a quote document for a complete kitchen will have a list of items and prices:

Pos	Qty	Code	L/R	Description	Price
1	1	BU100		1000MM Highline Base Unit	£225.27
2	1	BU50		500MM Highline Base Unit	£125.52
3	1	PLCV93VW		930 Plinth Int Curved Sect - Ivory Wood	£85.00
4	1	BU30		300MM Highline Base Unit	£110.77
5	1	WU100		1000MM Wall Unit	£250.73
6	1	WU50		500MM Wall Unit	£126.02
7	1	WU30		300MM Wall Unit	£106.22
8	1	OH60T1		600MM Double Oven Housing Unit - Type 1	£290.57
9	1	PLNO		2650 Plinth Natural Oak Inc Seal Strip	£22.40
10	1	W600CL200 AB		Worktop40 2000X600 LH Curve Harvard Oak	£247.75

1. To do this it is necessary to start the item list section with

the *star-phrase* : <<TableStart:ItemsX>>

and the repeated section must finish with the *end-phrase*: <<TableEnd:ItemsX>>.

2. Place all the fields that you wish repeated for each item between the start and the finish phrase, either by copying them from the existing template, or by inserting them using the **Quick Parts Gallery**. For example:

<<TableStart:ItemsX>>«POS»«QTY»«CODE»«HANDING»«NAME»«WIDTH» »x«HEIGHT»x«DEPTH»«PGNAME»	«QUOTE1»«TableEnd:ItemsX»
---	---------------------------

will produce a quotation document containing:

Position Number, Quantity, Code, Handing, Description, Width, Height, Depth, PG Name	Quote Price
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3. These fields will be repeated for each item in your quote.


4	1	BU30	300MM Highline Base Unit	£110.77
5	1	WU100	1000MM Wall Unit	£250.73
6	1	WU50	500MM Wall Unit	£126.02
7	1	WU30	300MM Wall Unit	£106.22
8	1	OH60T1	600MM Double Oven Housing Unit - Type 1	£290.57
9	1	PLNO	2650 Plinth Natural Oak Inc Seal Strip	£22.40
10	1	W600CL200 AB	Worktop40 2000X600 LH Curve Harvard Oak	£247.75

Saving your changes

When you have completed the changes to the template, save it. If you want to replace the existing template with the new one, save it with exactly the same file name. If you want to use your new template alongside any existing templates, save it with a different file name.

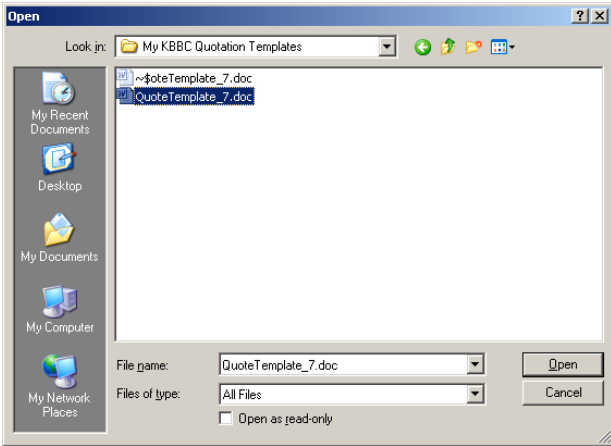
NOTE: We recommend that you save all of the templates you edit, with a new name. that way, if you make a mistake and ttemplate is unusable, your original will still work.

Uploading your Template to KBB Connect

1. In KBBConnect click on the Upload button 



2. Navigate to the file on your computer and upload it to your system.

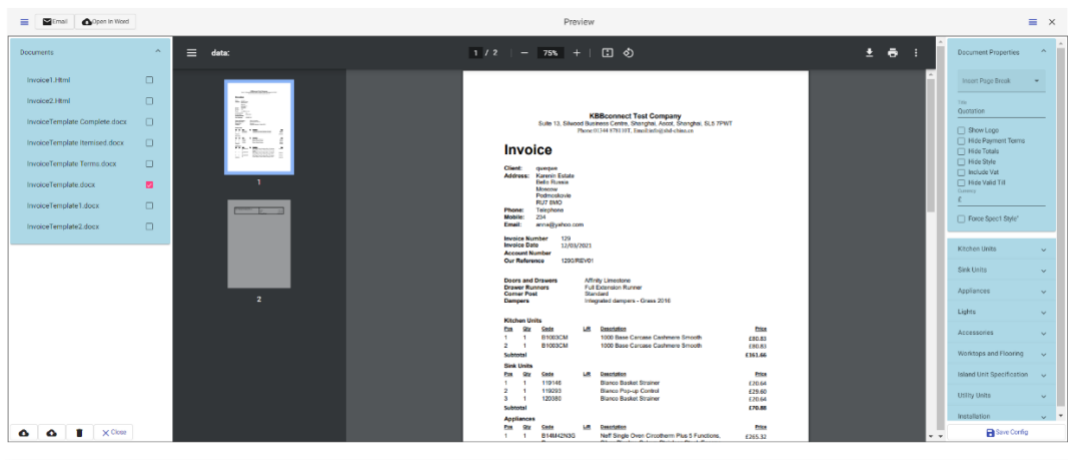


Invoices and delivery notes

You can also create and amend templates for both Invoices and Delivery Notes.

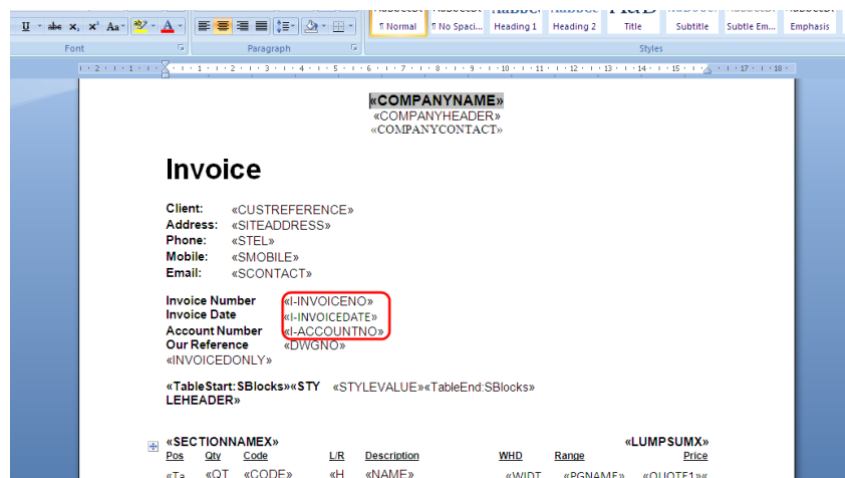
Invoices

1. Following the same procedures as detailed in the previous pages to navigate to the Sales Invoice area
2. Select the Projects tab and then select the **Sales Invoice** button in the **Tasks** Pane.
3. Click on 'Preview Invoice' and a sample template will be available for download.



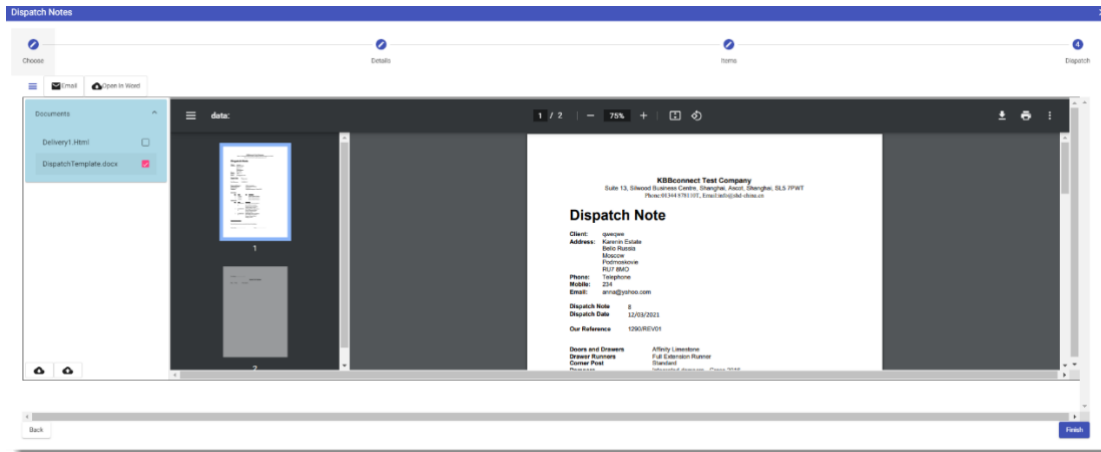
Within the Invoice template certain fields start with "I":

- I-INVOICENO
- I-INVOICEDATE
- I-ACCOUNTNO



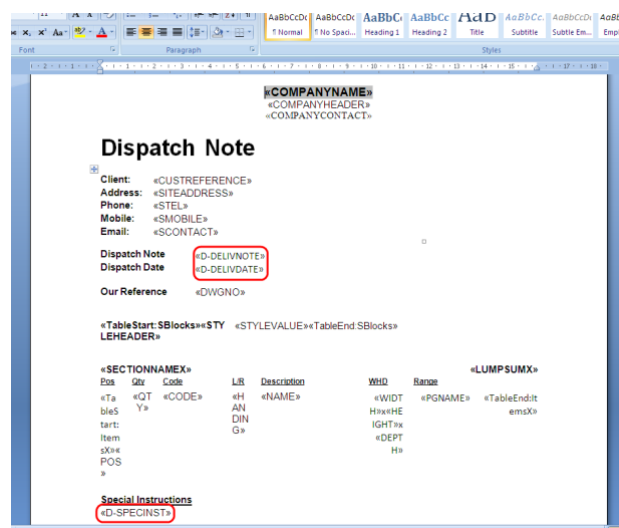
Dispatch/Delivery Notes

Once a delivery note has been created on the system you can download the template in the same manner as the Quotation template.



Note: Certain fields in the Dispatch/Delivery Note template start with “D”, for example:

- D-DELIVNOTE = Dispatch Note
- D-DELIVDATE = Delivery Date
- D-SPECINST = Dispatch Note Reference Number



A full list of fields for the Dispatch note template can be found on the following pages.

Commonly used field names and their meaning

Quotation Template	
Your Company Name	COMPANYNAME
Your Company Address	COMPANYHEADER
Your Company Contact Details	COMPANYCONTACT
Client Name	CUSTREFERENCE
CRM Client Name	CLIENTNAME
Address	SITEADDRESS
CRM Address	CLIENTADDRESS
Client Phone Number	STEL
CRM Phone	C-PHONE
Additional Address	FTBL3
Client Mobile Number	SMOBILE
CRM Mobile	C-MOBILE
Client Email address	SCONTACT
CRM Email	C-EMAIL
Company Phone Number	P-SALESPHONE
Job Reference	DWGNO
Quotation text for the top	FURMEMO
Title (Mr. Mrs etc.)	PTITLE
Initials	PINITIALS
Installation Text	INSTALTEXT1
Quotation text for the bottom	LASTMEMO
Sales Person Name	SALESMAN_NAME
Salesperson e-mail address	JS-EMAIL
Price band	PRDRANGE
User Name	U-PHONE
Product Name	PRODUCT_NAME
Range/Style Properties	
Range/Style Properties should be enclosed within:	«TableStart:SBlocks»
	«TableEnd:SBlocks»
They will then repeat for each Range/Style property entered in the Quote	
Range/Style Name	STYLEHEADER
Range/Style Value	STYLEVALUE
Section Summary Values	
Section Name	SECTIONNAMEX
Section Lump Sum	LUMPSUMX
Section Subtotal	SECTNETX
Section Supplier	SUPPLIER_NAME1

Quotation Template	
Section Discount	SECTDISCX
Section Total Cost	SECTCOSTX
Section Total	SECTTOTX
Calculations	CTRL+F9
Section Properties	
Section Properties should be enclosed within:	«TableStart:ItemsX»
	«TableEnd:ItemsX»
They will then repeat for each Item and Section in your Quote	
Position Number	POS
Quantity	QTY
Code	CODE
Handing	HANDING
Description	NAME
Width	WIDTH
Height	HEIGHT
Depth	DEPTH
Range Name	PGNAME
Item Supplier	SUPPLIER_NAME
Item Discount	DISCOUNT1
Item Cost	COST
Job Cost total	JOBCOST
Item Quote Price	QUOTE
Total Quote Price	QUOTE1
Item VAT	VATP
Show the Item Picture	Image:ITEMPICTURE
Payment Terms	
1 st Term Percentage	DP
2 nd Term Percentage	IP
3 rd Term Percentage	CP
4 th Term Percentage	PTPERC4
5 th Term Percentage	PTPERC5
1 st Term Text	DT
2 nd Term Text	IT
3 rd Term Text	CT
4 th Term Text	PTTEXT4
5 th Term Text	PTTEXT5
1 st Term Value	DV
2 nd Term Value	IV
3 rd Term Value	CV

Quotation Template	
4 th Term Value	PTSUM4
5 th Term Value	PTSUM5
Expected Payment Date 1	PTEXPDT1
Expected Payment Date 2	PTEXPDT2
Expected Payment Date 3	PTEXPDT3
Expected Payment Date 4	PTEXPDT4
Expected Payment Date 5	PTEXPDT5
Job Price Summary Values	
Net Job Price	SUMNETT
Total Discount on Job	SUMDISCOUNTALL
Net Job Price after Discount	SUMTOTAL
VAT on Job	SUMVAT
Gross Job Price	SUMTOTALVAT
Job Cost total	JOBCOST
Quotation valid until date	FTDT1

Sum Quote Price for Individual Sections

(NOTE: the section headings will be different if you create Bathroom or Bedroom quotes however the order from 1 -9 is always the left most section (Q1) to the right most (Q9))

NOTE 2: If you check the 'Include VAT' option in the Configuration Panel options then your figures will include VAT, otherwise they are Nett values.

Sum of Kitchen Units Net / Inc VAT	SUMSECTQ1 / SUMSECTQIVAT1
Sum of Sinks Net / Inc VAT	SUMSECTQ2 / SUMSECTQIVAT2
Sum of Appliances Net / Inc VAT	SUMSECTQ3 / SUMSECTQIVAT3
Sum of Lights Net / Inc VAT	SUMSECTQ4 / SUMSECTQIVAT4
Sum of Accessories Net / Inc VAT	SUMSECTQ5 / SUMSECTQIVAT5
Sum of Worktops and Flooring Net / Inc VAT	SUMSECTQ6 / SUMSECTQIVAT6
Sum of Fabrication Charges Net / Inc VAT	SUMSECTQ7 / SUMSECTQIVAT7
Sum of Utility Units Net / Inc VAT	SUMSECTQ8 / SUMSECTQIVAT8
Sum of Installation Net / Inc VAT	SUMSECTQ9 / SUMSECTQIVAT9
Fields available in the Site tab	
Site Name	SITENAME
Job Quantity	QTYJOBS
House Type	HOUSETYPE
Plot Numbers	PLOTSNOS
Job Version	JOBVERSION
Others (customised property)	SPROP2

Range and Style Property Options

(NOTE: the field names increment by one from left to right in the Spec1 and Spec2 tabs along the bottom of the project view, between 1 and 17)

Range/Style	PROP1
Front Colour / Trim	PROP2
Carcase Colour	PROP3
And so on down to Other	PROP17
Range/Style – on Spec 2 tab	PROPU1
Front Colour / Trim – on Spec 2 tab	PROPU2
Carcase Colour– on Spec 2 tab	PROPU3
And so on down to Other– on Spec 2 tab	PROPU17
Style Block 1	SBLOCKS
Style Block 2	SBLOCKS1

Section Discounts

(NOTE: the section headings will be different if you create Bathroom or Bedroom quotes however the order from 1 -9 is always the left most section (SDISCOUNT1) to the right most (SDISCOUNT9))

Section 1 discount total	SDISCOUNT1
Section 2 discount total	SDISCOUNT2
Section 9 discount total	SDISCOUNT9

Job Progress Dates

(You can enter these in the 'Job Progress' tab along the bottom of the main Projects view)

Order Received Date	TICKD1
Delivery Date	TICKD2
Goods Ordered Date	TICKD3
Goods Received Date	TICKD4
Goods Delivered Date	TICKD5

List of Installation items (Description of Work)

Section Properties should be enclosed within:	«TableStart:ItemsN17»
	«TableEnd:ItemsN17»
They will then repeat for each Item in your Installation Section	
Description	NAME
Quantity	QTY

Invoice Template

Order Number	ORDERNO
Invoice Number	I-INVOICENO
Invoice Date	I-INVOICEDATE
Account Number	I-ACCOUNTNO
Payment Terms	PAYTERMS
Invoice Sent Date	INVSENTDATE
Total Net price on Invoice	I-NETT
Total VAT on Invoice	I-VAT
Total Gross price on Invoice	I-ITOTAL

Invoice Items Fields	
Invoice Items fields should be enclosed within	«TableStart:InvoiceItems»
	«TableEnd:InvoiceItems»
They will then repeat for each item in your Invoice	
Invoiced Item Net Price	NETT
Invoiced Item VAT	VAT
	SECTVATX SUMSECTVATX SECTVAT_TAXRATE1-X SECTVAT_TAXRATE2-X SECTVAT_TAXRATE3-X SECTVAT_VALUE1-X SECTVAT_VALUE2-X SECTVAT_VALUE3-X
Invoice SECTION VAT Rate and Value	

Dispatch Template	
Delivery Date	D-DELIVDATE
Delivery Note Number	D-DELIVNOTE
Special Instructions	D-SPECINST
Delivery Items Properties	
Delivery Item fields should be surrounded by:	«TableStart:ItemsX»
	«TableEnd:ItemsX»
They will then repeat for each Item and Section in your Quote	
'Items to Follow' Properties	
'Items to follow' fields should be surrounded by:	«TableStart:ItemsToFollow»
	«TableEnd:ItemsToFollow»
They will then repeat for each Item and Section in your Quote	

We hope that this document is useful and fully understand that is you are not a Microsoft Word expert, creating Word templates can be daunting. If you need assistance with template creation, we can assist – please e-mail your template to our support team info@smart-systems.co.uk who will be able to provide training, or a quote to create the templates for you.