

Working with Remedials and Additions in KBBConnect

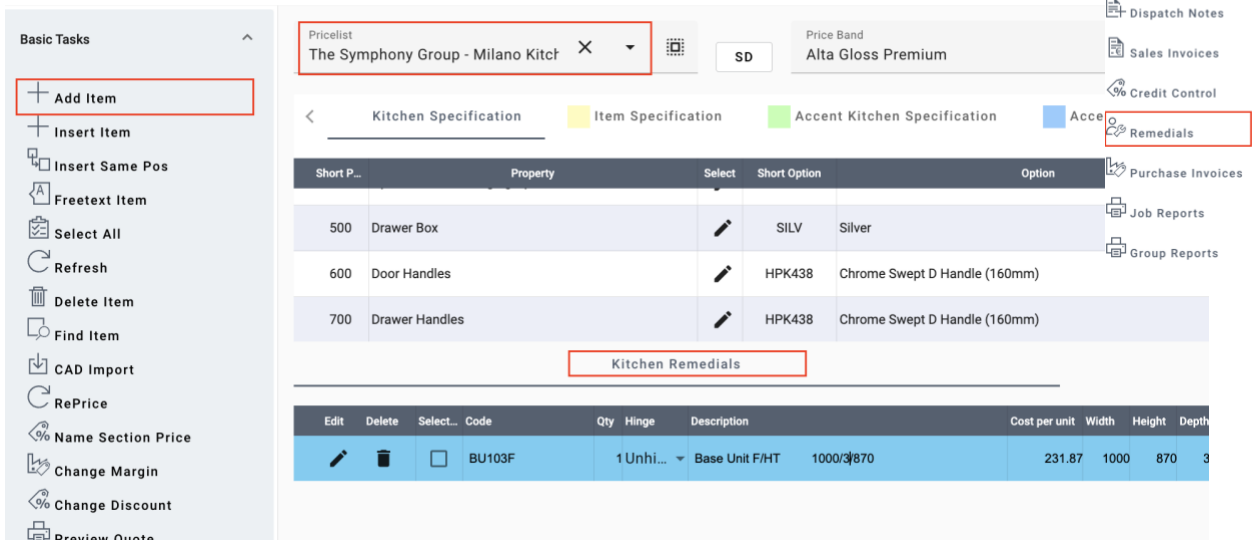
Items or work that is not of a satisfactory standard and needs to be replaced or redone can be completed with the **Remedials** options.

KBBConnect allows tracking and monitoring of after sales items at a project level more efficiently. This option is particularly useful when dealing with high numbers of after sales issues on a particular project.

Adding Remedials to a Project

To add in remedial items, highlight the project and in the main Projects **Tasks** menu on the left, click **Remedials** as shown in the screen shot below.

This will open a quotation screen similar to the main project quotation view, however, there will only be one tab for **Kitchen Remedials**; see the following screen:



The screenshot displays the KBBConnect interface for adding remedial items. On the left, the 'Basic Tasks' menu is visible, with 'Add Item' highlighted. The main area shows a 'Kitchen Remedials' section with a table of items. The table has columns for 'Short P...', 'Property', 'Select', 'Short Option', and 'Option'. The items listed are:

Short P...	Property	Select	Short Option	Option
500	Drawer Box		SILV	Silver
600	Door Handles		HPK438	Chrome Swept D Handle (160mm)
700	Drawer Handles		HPK438	Chrome Swept D Handle (160mm)

Below the table, there is a 'Kitchen Remedials' section with a table of items. The table has columns for 'Edit', 'Delete', 'Select...', 'Code', 'Qty', 'Hinge', 'Description', 'Cost per unit', 'Width', 'Height', and 'Depth'. The item listed is:

Edit	Delete	Select...	Code	Qty	Hinge	Description	Cost per unit	Width	Height	Depth
			BU103F	1	Unhi...	Base Unit F/HT	1000/3870	231.87	1000	870

On the right-hand side, there is a vertical menu with various options, including 'Remedials', which is highlighted with a red box.

Entering Remedial Items into your project

You can enter items into the **Remedials** view just as you would in the main quotation view.

First select the catalogue and the price band/ range for the item.

If you know the code of the item you want to enter, simply type it in the code column and hit enter. You can use the arrow keys or mouse to navigate to the item you need in the list. This will enter the item into the Remedials section and create a new line for another item.

If you need a new line for an item at any time you can do it by pressing the down arrow on the keyboard or clicking **Add Item**.

Searching by description:

If you do not know the code of the item, you can also search for it using keywords in a description.

- Click the **'Find Item'** button on the left hand side of the screen.

Or

- Click the **Edit** button next to an empty line in the list.

The search screen will appear:

Add	Picture	Code	Description	Sell Price	Width	Height	Depth
<input type="checkbox"/>		BU103F	Base Unit F/HT 1000/3/870	463.74	1000	870	300
<input type="checkbox"/>		BU105D	Base Unit 1000/600/870	661.9	1000	870	600
<input type="checkbox"/>		BU106DG2	Base Unit 2 Ends 1000/600/870	661.9	1000	870	600
<input type="checkbox"/>		BU106DGL	Base Unit LH End 1000/600/870	661.9	1000	870	600
<input type="checkbox"/>		BU106DGR	Base Unit RH End 1000/600/870	661.9	1000	870	600
<input type="checkbox"/>		BU106F	Base Unit F/HT 1000/600/870	490.48	1000	870	600
<input type="checkbox"/>		BU106FG2	Base Unit F/H 2 Ends 1000/600/870	490.48	1000	870	600
<input type="checkbox"/>		BU106FGL	Base Unit F/H LH End 1000/600/870	490.48	1000	870	600
<input type="checkbox"/>		BU106FGR	Base Unit F/H RH End 1000/600/870	490.48	1000	870	600

Select the **Add Item** button to add the Remedial item. You can also narrow the search down by typing in keywords into the description field, for example 'base' or '600'. Again, when you locate the item, click to add the items into your quotation.

To order the items, click on the **Purchase Order** button.

NOTE: Remedial items cannot be charged to the customer, they are seen as items that have been damaged and need replacing, but not at the expense of the customer - therefore you will see a **Cost per unit** column, but not a **Quote** column in the Remedials section and there is no facility to produce a quote for remedial items. . If you do intend to charge for the items, treat them as **Additions** – see page 3, Adding Additional Items to a Project.

The cost of Remedials

You can easily see the cost of remedials in relation to the whole job by using the **Price Sums** feature in KBBConnect: Select **Advanced Tasks** in the main Tasks Select the **Price Sums** button.

You will see that the *Kitchen Remedials* section has been added at a cost to the job, and the impact on your profit and margin.

Section	Cost	Quote	Discount	Est. Profit	Est. Margin%
Kitchen Units	£1,196.01	£2,173.52	£0.00	£977.51	44.97
Sinks	£718.90	£1,179.49	£0.00	£460.59	39.05
Appliances	£1,345.00	£1,925.86	£489.10	£580.86	30.16
Kitchen Remedials	£231.87	£0.00	£0.00	-£231.87	0.00
Kitchen Additions	£83.15	£166.30	£0.00	£83.15	50.00
Total	£3,574.93	£5,445.17	£489.10	£1,870.24	34.35
Vat		£1,089.03	Discount		
Overall Total		£6,534.20			

Adding Additional Items to a Project

If you wish to add additional *chargeable* items to the job, **after** the original quote and order have been sent, then the following is recommended:

- Clone the project and add all new items to the appropriately named Project, e.g. *3964/Additions*

OR

- Click on Remedials and go to Addition Section to add items in

• Any

Section	Cost	Quote	Discount	Est. Profit	Est. Margin%
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Sinks	£718.90	£1,179.49	£0.00	£460.59	39.05
Appliances	£1,345.00	£1,925.86	£489.10	£580.86	30.16
Kitchen Remedials	£231.87	£0.00	£0.00	-£231.87	0.00
Kitchen Additions	£83.15	£166.30	£0.00	£83.15	50.00
Total	£3,574.93	£5,445.17	£489.10	£1,870.24	34.35
Vat		£1,089.03	Discount		
Overall Total		£6,534.20			

additions added will show in price sums and the cost for customer will increase.

- Any additions or remedials added needs to go through same process as any original items (Purchase order, Warehouse, Dispatch Note)

Adding a new Aftersale

KBBConnect allows you to create a snagging list and keep track of the progress of the fixes and Remedials.

To access this information locate the **Aftersale** tab along the bottom of the main Projects list.

Name	Created	Ordered On	Deliv. Req.	Goods In	Delivered	Completed
1:BU103F:Base Unit F/HT 1000/3/870	14/08/2024					

Here you will see a summary of each of the Remedial items you have ordered in a list view - this enables tracking of the items by their Ordered, Delivery Request, Goods In, Delivery and Completed dates.

To create a Snagging 'to do list (not goods to be ordered) select the **New** button and enter the relevant details of the fault/snag using the date fields to keep track of the progress.

New Aftersale ×

Please enter details for the aftersale

Name
Name //

Created 14/08/2024 📅	Ordered On 📅	Deliv. Req. 📅	Goods in 📅
Delivered 📅	Completed 📅		

Feedback

We hope you found this document useful and would love 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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