

Quoting and Ordering in KBBConnect

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Creating Quotations in KBBConnect

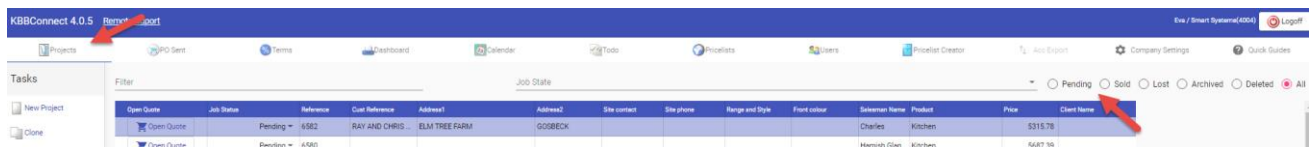
The creation of tailored quotations is a key benefit of using KBBConnect. The quotations you create are based on margins you set and automatically produced with accurate pricing, based on real-time data. The flexibility of the system allows you to set discounts and amend prices according to your clients' budgets, without laborious manual re-calculation. You can keep several versions of the same quote if you wish, and convert the one you use to a Sold job.

The Projects Screen

The main **Projects** screen lists all quoted and ordered projects and is the main area of the system you will work in when quoting and tracking projects and customers.

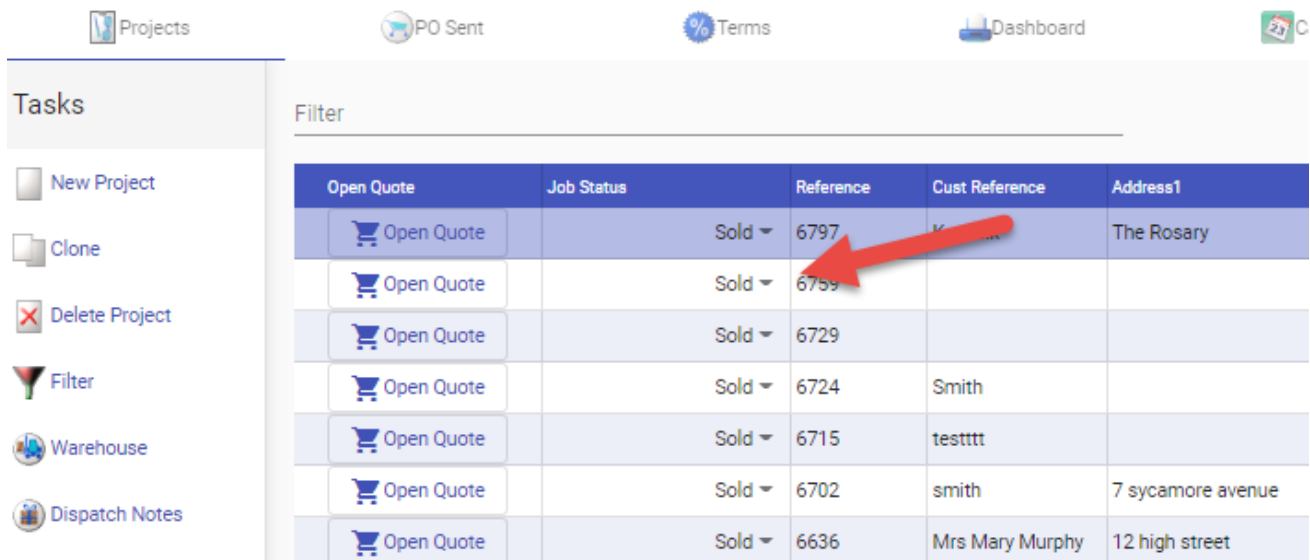
The status of each project is categorised and displayed using the Job Status tab:

All Pending Sold Lost Archived All



Open Quote	Job Status	Reference	Cust Reference	Address1	Address2	Site contact	Site phone	Range and Style	Front colour	Salesman Name	Product	Price	Client Name
Open Quote	Pending	6582	RAY AND CHRIS	ELM TREE FARM	GOOSEBCK					Charles	Kitchen	5315.78	
Open Quote	Pending	6580								Hannah Glad...	Kitchen	5687.39	

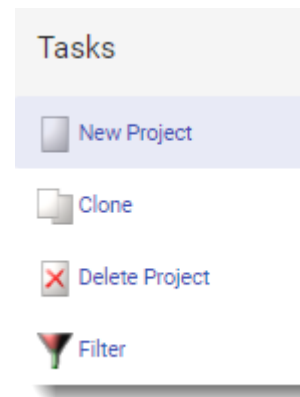
By selecting the **Sold** radio button for example, all other job types will be hidden, as shown below:



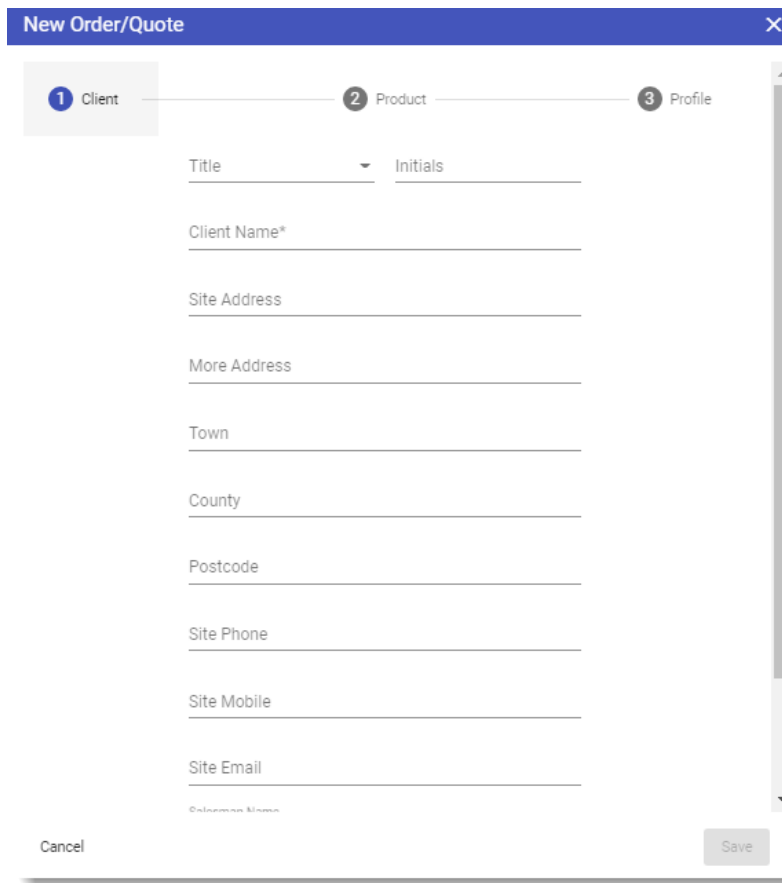
Open Quote	Job Status	Reference	Cust Reference	Address1
Open Quote	Sold	6797		The Rosary
Open Quote	Sold	6759		
Open Quote	Sold	6729		
Open Quote	Sold	6724	Smith	
Open Quote	Sold	6715	testttt	
Open Quote	Sold	6702	smith	7 sycamore avenue
Open Quote	Sold	6636	Mrs Mary Murphy	12 high street

Creating a New Quotation

1. To create a new Quote, select [New Project](#) from the Tasks Pane in the Projects Screen



The **New Order/ Quote** dialog box will appear:



2. Complete the client details and select the **Next** button
3. Select the type of project: Kitchen, Bedroom, Bathroom or Items and the appropriate VAT Scheme to be applied

New Order/Quote

Client

2 Product

3 Profile

Product

Kitchen

VAT Schema

Kitchen Normal

Back

Next

Cancel

Save

- Select the **Next** and **Save** button.

New Order/Quote

Client

Product

3 Profile

How did you hear about us*

Status*

Est Sold Date*

Walk In

Fitted

30/11/2020

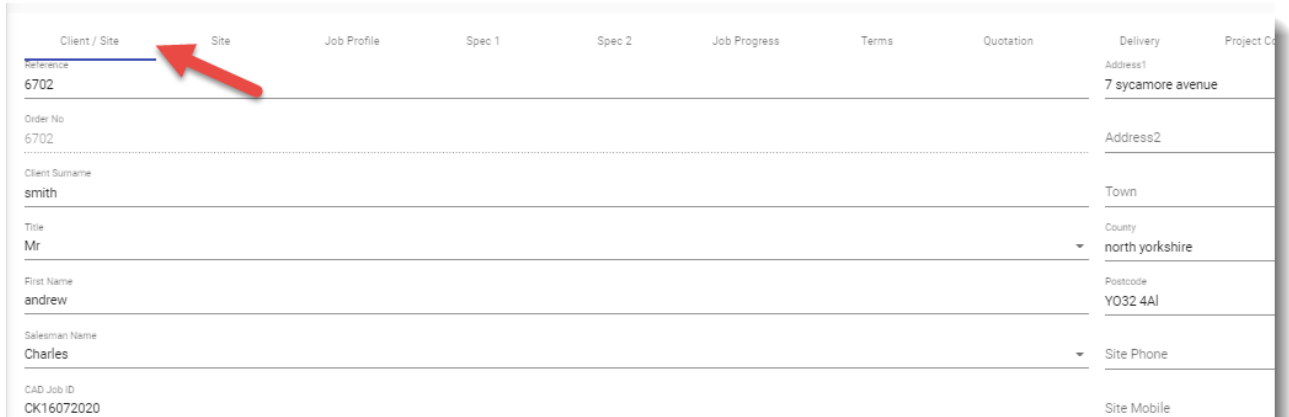
Notes

Back

Save

Cancel

The new project file will be created and all customer information already created will be stored under the CRM tabs displayed at the bottom of the screen. It will be categorised as **Pending** and will only have client information contained within it.

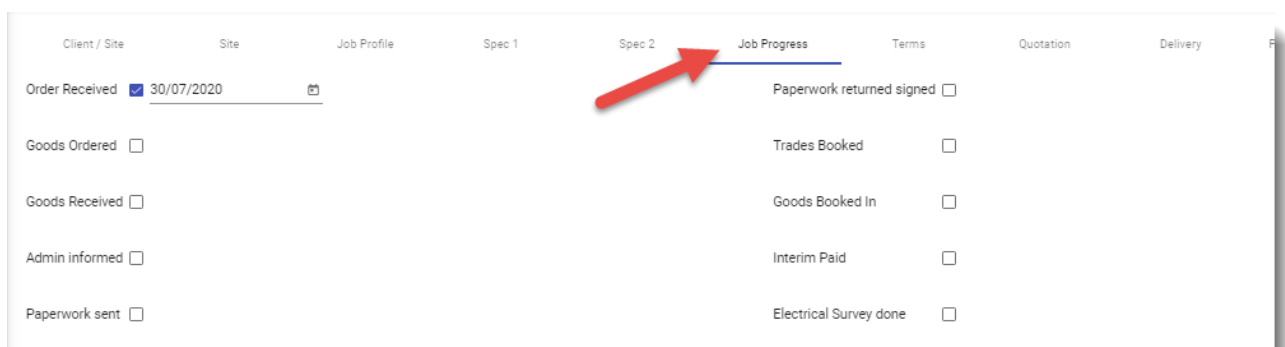


Client / Site	Site	Job Profile	Spec 1	Spec 2	Job Progress	Terms	Quotation	Delivery	Project Co
Reference 6702								Address1 7 sycamore avenue	
Order No 6702								Address2	
Client Surname smith								Town	
Title Mr								Country north yorkshire	
First Name andrew								Postcode YO32 4AI	
Salesman Name Charles								Site Phone	
CAD Job ID CK16072020								Site Mobile	

As the status of the sale progresses, you complete the check boxes in the **Job Progress** tab with dates.

Each date entered fills the colour bar and gives a handy visual reminder of a project's status.

Open Quote	Job Status	Reference ▼	Cust Reference	Address1	Address2
Open Quote	Sold ▼	vic/4567tes	Mr WILSON	27 MONTPELLIER R...	
Open Quote	Sold ▼		Mr Kitchen	123 Kitchen Street	
Open Quote	Sold ▼	Smith JR	Mr Smith		
Open Quote	Sold ▼	IP04SMITH/TRAINING	Mr & Mrs Smith	Smith Road	Smith Road
Open Quote	Sold ▼	CHARLESJOB/REV01	Clarke	1 Acacia Drive	Forest Road



Client / Site	Site	Job Profile	Spec 1	Spec 2	Job Progress	Terms	Quotation	Delivery	P
Order Received <input checked="" type="checkbox"/> 30/07/2020					Paperwork returned signed <input type="checkbox"/>				
Goods Ordered <input type="checkbox"/>					Trades Booked <input type="checkbox"/>				
Goods Received <input type="checkbox"/>					Goods Booked In <input type="checkbox"/>				
Admin informed <input type="checkbox"/>					Interim Paid <input type="checkbox"/>				
Paperwork sent <input type="checkbox"/>					Electrical Survey done <input type="checkbox"/>				

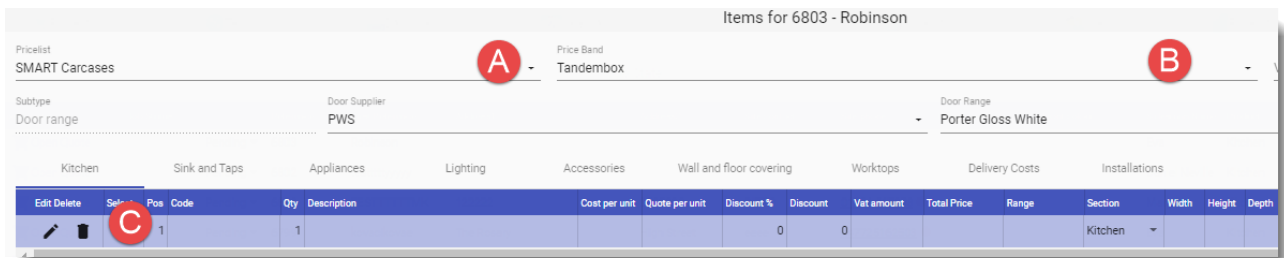
Adding Components to a Quotation


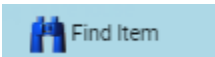
When you first create a quotation in KBBConnect it will be empty and will be displayed in the Projects list as **Pending** under Job Status.

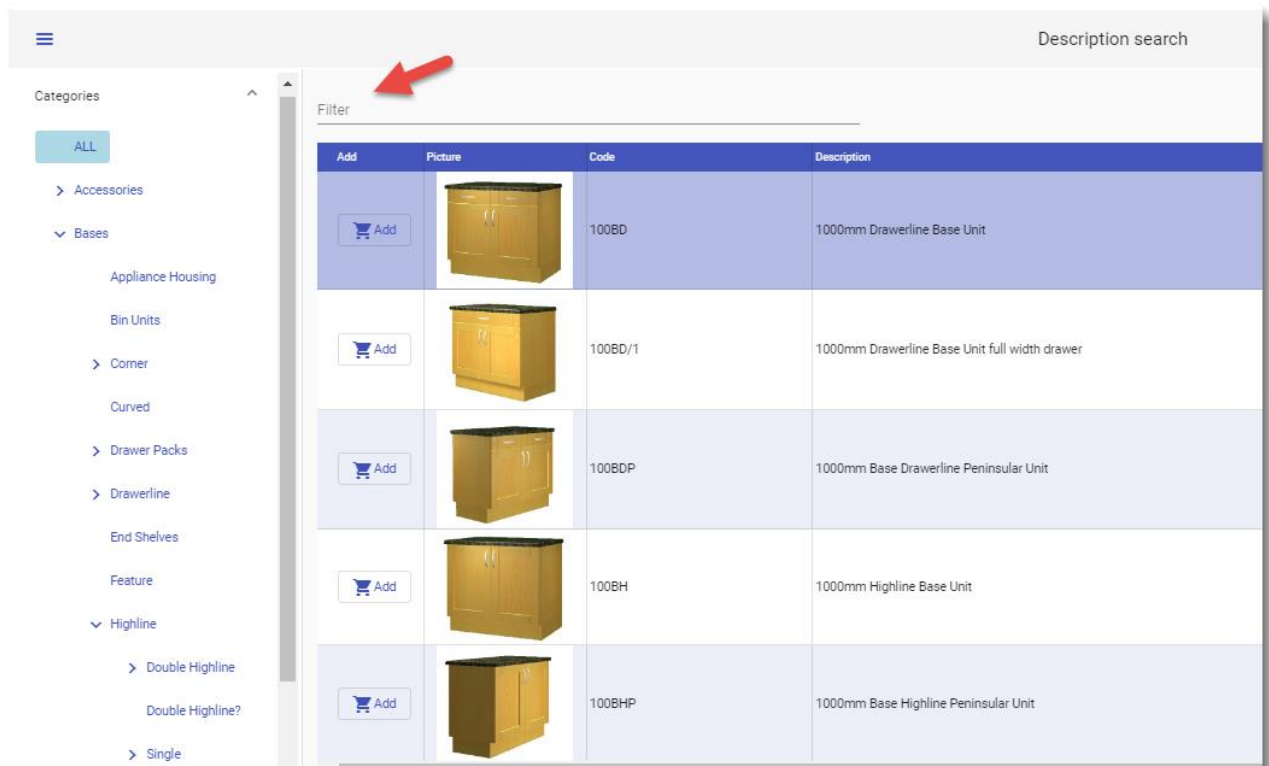
To open the Quote and enter items

1. Select the project and Open Quote  button.

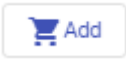
The following screen will be displayed:

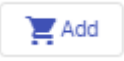


- a. Choose the Supplier's pricelist e.g. *SMART Carcasses*
 - b. Choose the price-band e.g. *Tandembox*
 - c. Click on the Search Price-list button  or select the  Command in the Task Pane
2. The following Pricelist Search Screen will appear, showing the supplier's pricelist and appropriate range:



Find the group of products that you are interested by selecting the section in the family tree on the left or type a description or part of the item code to find an item. The system will filter and show pictures or a list of the supplies products.

3. Click on the **Add Item** button  to insert the item into the quotation. You will return to the quote screen.

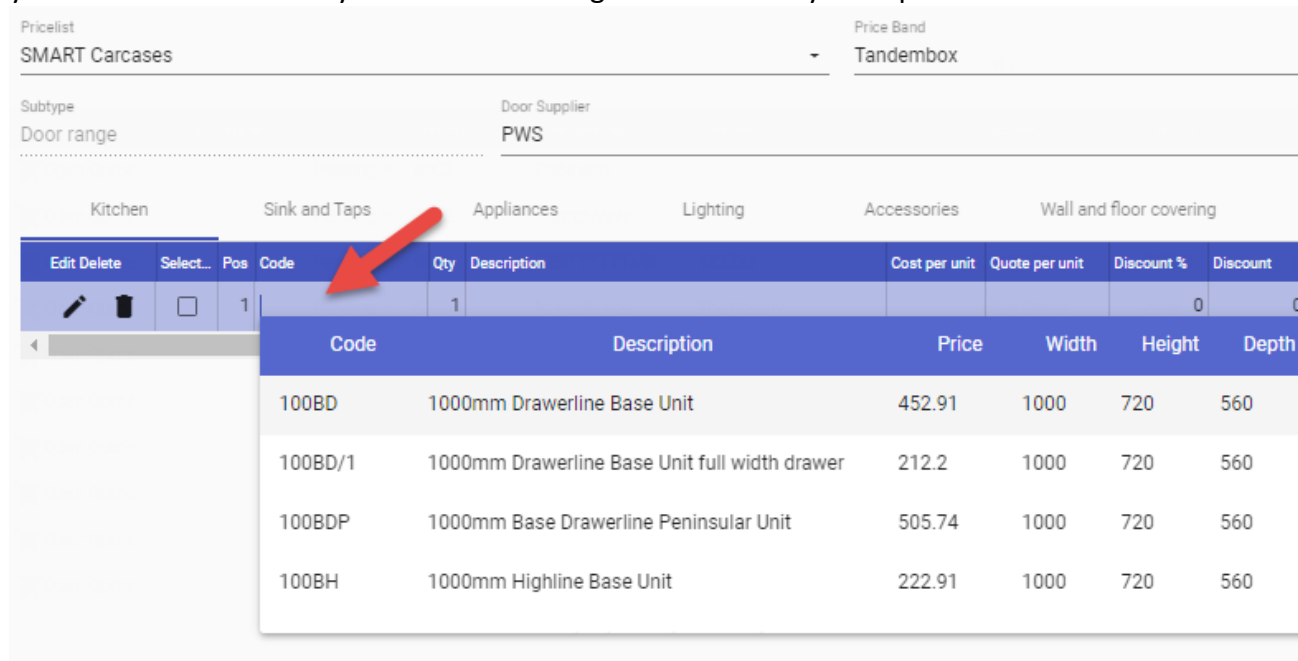
TIP: To add more than 1 item from a pricelist click in the tick boxes and when finished, click on an **Add Item** button . All items will be entered into the quote.

4. Repeat the steps to add more items into the quotation and work your way across the sections for each relevant area of the sale. Your KBBConnect quote will present the quote by each of the section/tab names where you enter information.

NOTE: You can create the quote using the method above, or by importing from a CAD package. For CAD imports please follow the on-screen information supplied for different CAD products.

Line entry for goods

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 require in the list if needed.



Code	Description	Price	Width	Height	Depth
100BD	1000mm Drawerline Base Unit	452.91	1000	720	560
100BD/1	1000mm Drawerline Base Unit full width drawer	212.2	1000	720	560
100BDP	1000mm Base Drawerline Peninsular Unit	505.74	1000	720	560
100BH	1000mm Highline Base Unit	222.91	1000	720	560

This will enter the item into the quote and create you a new line for another item.

TIP: If you do need a new line for an item at any time you can do it by pressing the down arrow on the keyboard or click on **Add Item** in **Basic Tasks** on the left of your screen.

How can I check that I have the correct prices?


If your discount structure is complex and you are not sure how KBBConnect has calculated your discount, there is a simple way to check, using the KBBConnect **Report Wrong Price** feature. Within a quotation, select the line in the quote containing the item you wish to check and then click on the **Report Wrong Price** button at the bottom of the screen. This will display a window showing a breakdown of the cost price and quotation price calculation.

Wrong Price ?
✕

Code:	100BDP	
Description:	1000mm Base Drawerline Peni...	
Pricelist:	SMART Carcases	March Ver2014
Range:	Tandembox	
Discount Group:	cabinet	
Pricelist Price:	272.32	Is this price correct ? <input type="radio"/> Yes <input type="radio"/> No
Discount:	35.00%	95.31
Cost Price:	272.32 - 95.31 = 177.01	
Margin:	65.00%	328.73
Sell Price:	177.01 - 328.73 = 505.74	

Comments:

Is this picture correct ? ☐ Yes ☐ No



Close
Send

It displays:

- the item's range,
- the catalogue price as stored in KBBConnect,
- the discount group that the item belongs to, and the discount and margin percentages.

This shows you, in detail, how the cost and quotation price is calculated. If the discount or margin percentages are incorrect then you can easily go back to the **Terms** tab and change your percentages.

NOTE: If you change the discount and margin percentages, you will need to click on the **RePrice** option on the left hand **Tasks** menu within the Projects screen.

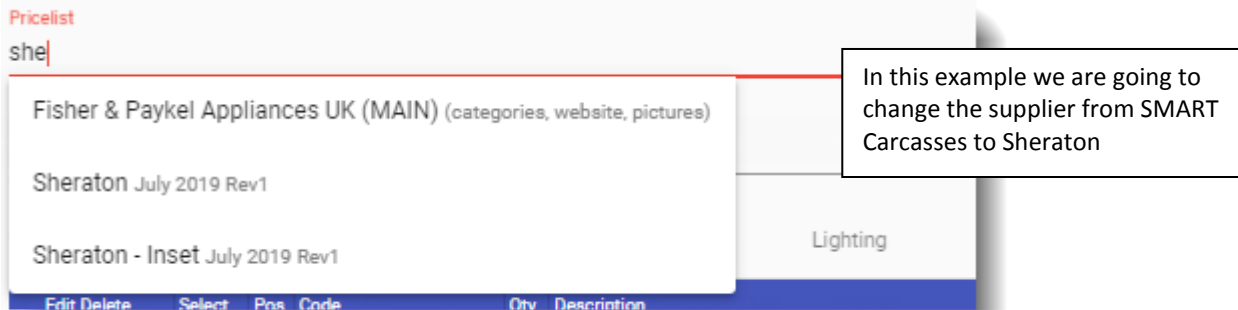
The **Catalogue (Pricelist) Price** shown will usually be the Retail price excluding VAT, or in some cases the Trade price. In the event you are using a Trade pricelist then it is possible that you will not need a discount percentage, the catalogue price may already be the same as your cost price.

If you are still certain that KBBConnect holds the incorrect item price please either call the SMART Systems Customer Support line on 01923 919 278, or alternatively click on the **No** button and click on **Send** and your query will be emailed to our Customer Support Team for investigation. Our Pricelist Team will investigate and contact you with the result.

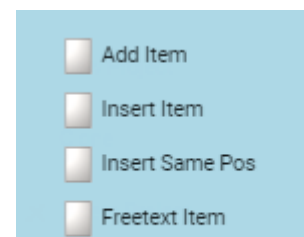
NOTE: All prices in KBBConnect are quoted **without VAT** as VAT is handled separately by the system.

Re-pricing a Quotation

To Use more than one Supplier in a Section



1. Add items you require from one supplier
2. Add a new item using either the [Add Item](#) or [Insert Item](#) command. [Add Item](#) inserts a new line at the bottom of the section, [Insert Item](#) inserts a new line above the current item.
3. Choose a different supplier from the Pricelist drop-down
4. Choose items as usual.



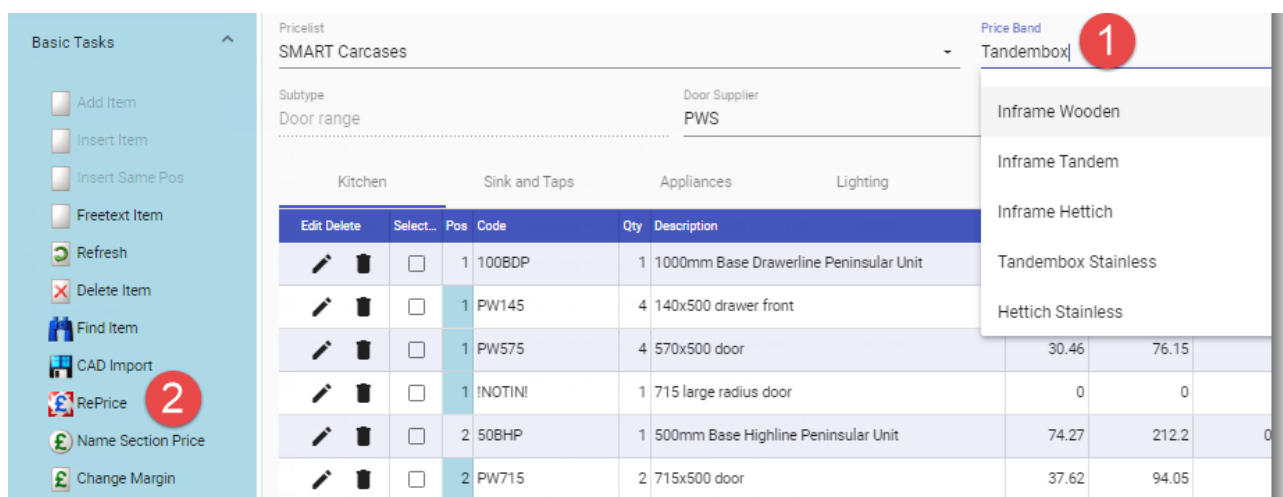
KBBConnect will access the appropriate pricelists/ prices for every item based on the supplier chosen.


Changing Supplier Ranges and Re-pricing the Quotation

You can re-price your units in a different style/price band by selecting a different price band at the top of the screen and clicking the button the [Clone Job](#) command on the **Task** Menu

In the following example the units are being re-priced from Evesham to Old Windsor Pine.

1. Change the **price band**



2. Select the  **RePrice** button on the **Tasks** menu and KBBConnect will go through all items, re-pricing them in the new style.

Using more than 1 Supplier Range within a Quotation

In KBBConnect it's possible to use different suppliers and/or different ranges from a single supplier within a quote section. In the following example some units are being re-priced from Tandembox to Tandembox Stainless:

1. Select the items for which you want to change the range, by placing ticks in each item line.
2. Change the **price band**.

Pricelist

SMART Carcasses

Subtype

Door range

Door Supplier

PWS

Kitchen

Sink and Taps

Appliances

Lighting

Edit	Delete	Select...	Pos	Code	Qty	Description
		<input type="checkbox"/>	1	100BDP	1	1000mm Base Drawerline Peninsular Unit
		<input type="checkbox"/>	1	PW145	4	140x500 drawer front
		<input type="checkbox"/>	1	PW575	4	570x500 door
		<input checked="" type="checkbox"/>	2	508HP	1	500mm Base Highline Peninsular Unit
		<input type="checkbox"/>	2	PW715	2	715x500 door
		<input checked="" type="checkbox"/>	1	5BH	1	450mm Highline Base Unit
		<input type="checkbox"/>	3	PW715X447	1	715x450 door
		<input checked="" type="checkbox"/>	4	50W6	1	500mm Low Wall Unit

Price Band

Tandembox

Inframe Wooden


Inframe Tandem

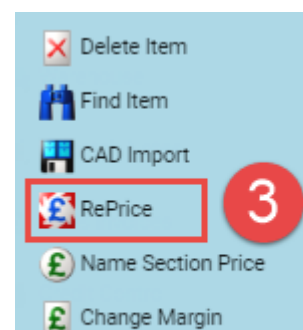
Inframe Hettich

Tandembox Stainless

Hettich Stainless

30.46	76.15	0	15.23	Porter Gloss Wl
74.27	212.2	0	42.44	Tandembox
37.62	94.05	0	18.81	Porter Gloss Wl
74.27	212.2	0	42.44	Tandembox
34.29	85.72	0	17.14	Porter Gloss Wl
74.27	212.2	0	42.44	Tandembox

3. Select the  **RePrice** button on the **Tasks** menu and KBBConnect will go through the selected items, and re-price them in the new style.



4. Notice that the 3 items selected have now been changed to Tandembox Stainless and re-priced accordingly.

Pricelist

SMART Carcasses

Door Supplier

PWS

Price Band

Tandembox Stainless

Door Range

Porter Gloss White

Kitchen

Sink and Taps

Appliances

Lighting

Accessories

Wall and floor covering

Worktops

Delivery Costs

Installations

Edit Delete	Select	Pos	Code	Qty	Description	Cost per unit	Quote per unit	Discount %	Discount	Vat amount	Total Price	Range
		<input type="checkbox"/>	1 100BDP	1	1000mm Base Drawerline Peninsular Unit	177.01	505.74		0	101.15		Tandembox
		<input type="checkbox"/>	1 PW145	4	140x500 drawer front	10.66	26.65		0	5.33		Porter Gloss White
		<input type="checkbox"/>	1 PW575	4	570x500 door	30.46	76.15		0	15.23		Porter Gloss White
		<input checked="" type="checkbox"/>	2 50BHP	1	500mm Base Highline Peninsular Unit	74.27	212.2		0	42.44		Tandembox Stainless
		<input type="checkbox"/>	2 PW715	2	715x500 door	37.62	94.05		0	18.81		Porter Gloss White
		<input checked="" type="checkbox"/>	3 45BH	1	450mm Highline Base Unit	74.27	212.2		0	42.44		Tandembox Stainless
		<input type="checkbox"/>	3 PW715X447	1	715x450 door	34.29	85.72		0	17.14		Porter Gloss White
		<input checked="" type="checkbox"/>	4 50W6	1	500mm Low Wall Unit	74.27	212.2		0	42.44		Tandembox Stainless

Changing Door Ranges within a quote

If you have chosen a separate carcass and door supplier, you can easily re-price all aspects of the kitchen. To re-price the doors using a different range:

1. Select the Door Range Supplier by clicking on the down arrow in the **Door Supplier** column.
2. Select the range from the **Door Range** list.
3. Select **Re-Price Doors**
Only the door prices will be re-calculated, as opposed to the entire section.

Pricelist

SMART Carcasses

Price Band

Tandembox Stainless

Valid Until

RRP Only

Subtype

Door range

Door Supplier

PWS

Door Range

Porter Gloss White

Kitchen

Sink and Taps

Appliances

Lighting

Accessories

Wall and floor covering

Worktops

Edit	Delete	Select	Pos	Code	Qty	Description	Cost per unit	Quote per unit	Discount %	Discount	Vat amount	Total	Notes
		<input type="checkbox"/>	1	100BDP	1	1000mm Base Drawerline Peninsular Unit	177.01	505.74		0	101.15		
		<input type="checkbox"/>	1	PW145	4	140x500 drawer front	10.66	26.65		0	5.33		
		<input type="checkbox"/>	1	PW575	4	570x500 door	30.46	76.15		0	15.23		
		<input checked="" type="checkbox"/>	2	50BHP	1	500mm Base Highline Peninsular Unit	74.27	212.2		0	42.44		
		<input type="checkbox"/>	2	PW715	2	715x500 door	37.62	94.05		0	18.81		
		<input checked="" type="checkbox"/>	3	45BH	1	450mm Highline Base Unit	74.27	212.2		0	42.44		
		<input type="checkbox"/>	3	PW715X447	1	715x450 door	34.29	85.72		0	17.14		

Alpina Matt Deep Oak

Alpina Matt Natural Oak

Alpina Textured Smoked Larch

Alpina Textured Mid Oak

Alpina Textured Burnt Ash

Porter Gloss White

Kitchen

497

715

0

T1

Tandembox Stainless

Kitchen

450

720

560

Unli...

T1

Porter Gloss White

Kitchen

447

715

0

T1

Using the Accent Kitchen Specification feature

The Accent Kitchen specification feature enables you to specify up to 2 additional Accent Kitchen ranges or individual items with special features, within the main body of your quotation. To do this:

1. Enter your main kitchen items as usual.

Pricelist: The Symphony Group - Milano Kitchens

Price Band: **Alta Gloss Rigid**

Kitchen Specification | Item Specification | Accent Kitchen Specification | Accent Kitchen Specification 1

Short Pr...	Property	Select	Short Option	Option
100	Door Range		ALGRI	Alta Gloss Rigid
200	Door Colour		ALGRI/4	Gloss Pure White
300	Cabinet Colour		WHIT	White
400	Optional Cabinet Edging Option		NORE	Not Required

		Kitchen	Sink and Taps	Appliances	Lighting	Accessories	Wall and floor covering	Worktops	Delivery Costs			
Edit Delete	Select...	Pos	Code	Qty	Description	Cost per unit	Quote per unit	Discount %	Discount	Vat amount	Total Price	Range
		<input type="checkbox"/>	1 BU56F	1	Base Unit F/HT 500/600/870	93.07	344.7	0	0	68.94		Alta Gloss Rigid
		<input type="checkbox"/>	2 BU106D	1	Base Unit 1000/600/870	187.17	693.22	0	0	138.64		Alta Gloss Rigid
		<input type="checkbox"/>	3 WU4556	1	Wall Unit 450/300/560	89.66	332.07	0	0	66.41		Alta Gloss Rigid

2. To enter your accent kitchen, select The **Accent Kitchen Specification** tab, and then select the Door Range, Colour and other property options, as shown below

Pricelist: The Symphony Group - Milano Kitchens

Price Band: **Alta Gloss Premium**

Kitchen Specification | Item Specification | **Accent Kitchen Specification** | Accent Kitchen Specification 1

Short Pr...	Property	Select	Short Option	Option
100	Door Range		ALGP	Alta Gloss Premium
200	Door Colour		ALGP/4	Gloss Pure White
300	Cabinet Colour		IVOR	Ivory
400	Optional Cabinet Edging Option		WHIT	White

		Kitchen	Sink and Taps	Appliances	Lighting	Accessories	Wall and floor covering	Worktops	Delivery Costs	Install		
Edit Delete	Select...	Pos	Code	Qty	Description	Cost per unit	Quote per unit	Discount %	Discount	Vat amount	Total Price	Range
		<input type="checkbox"/>	1 BU56F	1	Base Unit F/HT 500/600/870	93.07	344.7	0	0	68.94		Alta Gloss Rigid
		<input type="checkbox"/>	2 BU106D	1	Base Unit 1000/600/870	187.17	693.22	0	0	138.64		Alta Gloss Rigid
		<input type="checkbox"/>	3 WU4556	1	Wall Unit 450/300/560	89.66	332.07	0	0	66.41		Alta Gloss Rigid
		<input type="checkbox"/>	4 BOH66	1	Built Under Housing 600/600/870	87.96	325.78	0	0	65.16		Alta Gloss Rigid
		<input type="checkbox"/>	5 CB86DB	1	Corner Base 300 Door/Dw 800/600/870	149.41	553.37	0	0	110.67		Alta Gloss Rigid
		<input type="checkbox"/>	6 BOH66AGR	1	BOH (120 Fascia) RH End 6/6/870	76.49	283.3	0	0	56.66		Alta Gloss Rigid
		<input type="checkbox"/>	7 BU63D	1	Base Unit 600/300/870	113.41	420.04	0	0	84.01		Alta Gloss Premium
		<input type="checkbox"/>	8 CB86DB	1	Corner Base 300 Door/Dw 800/600/870	164.35	608.7	0	0	121.74		Alta Gloss Premium

3. Select the **Preview Quotation** button:

In this example the main kitchen is quoted in Alta Gloss Rigid with Gloss Pure White Doors and the Accent Kitchen items are Alta Gloss Premium with Gloss Pure White doors.

Note the quotation shows the **Main** and the **Accent Kitchen** and the Ranges can be shown per item, as displayed:

Quotation

Client: Miss E Robinson
Address: fdsds
Phone:
Mobile:
Email:


Job Number: 6803

Door Range	Alta Gloss Rigid
Door Colour	Gloss Pure White
Cabinet Colour	White
Optional Cabinet Edging	Not Required
Option	
Drawer Box	Silver
Door Handles	Antique Copper D Handle (160mm)
Drawer Handles	Nickel Arched D Handle (160mm)

Accent Specification*	
Door Range	Alta Gloss Premium
Door Colour	Gloss Pure White
Cabinet Colour	Ivory
Optional Cabinet Edging	White
Option	
Drawer Box	Silver
Door Handles	Nickel Arched D Handle (160mm)
Drawer Handles	Nickel Arched D Handle (160mm)

Code	L/R	Description	Range	Price
BU56F		Base Unit F/HT 500/600/870	Alta Gloss Rigid	£344.70
BU106D		Base Unit 1000/600/870	Alta Gloss Rigid	£693.22
WU4556		Wall Unit 450/300/560	Alta Gloss Rigid	£332.07
BOH66		Built Under Housing 600/600/870	Alta Gloss Rigid	£325.78
CB86DB		Corner Base 300 Door/Dw 800/600/870	Alta Gloss Rigid	£553.37
BOH66AGR		BOH (120 Fascia) RH End 6/6/870	Alta Gloss Rigid	£283.30
BU63D		Base Unit 600/300/870*	Alta Gloss Premium	£420.04

Changing your Accent Kitchen Range

1. To change your Accent kitchen items to another range, select the items you wish to alter.
2. Select the Accent Kitchen Specification tab
3. Change the Price band, in the example below from Alta Gloss Rigid to Alta Gloss Premium
4. Select the  [RePrice](#) button.

Basic Tasks

- Add Item
- Insert Item
- Insert Same Pos
- Freertext Item
- Refresh
- Delete Item
- Find Item
- CAD Import
- RePrice**
- Name Section Price
- Change Margin
- Change Discount
- Preview Quote
- Purchase Orders
- Document Manager

Advanced Tasks

Custom Tasks

Pricelist: The Symphony Group - Milano Kitchens

Price Band: **Alta Gloss Premium**

Kitchen Specification: **Accent Kitchen Specification**

Short Pr...	Property	Select	Short Option	Option
100	Door Range		ALGP	Alta Gloss Premium
200	Door Colour		ALGP/4	Gloss Pure White
300	Cabinet Colour		IVOR	Ivory
400	Optional Cabinet Edging Option		WHIT	White

Edit Delete	Select...	Pos	Code	Qty	Description	Cost per unit	Quote per unit	Discount %	Discount	Vat amount	Total Price	Range
			1 BU56F	1	Base Unit F/HT 500/600/870	93.07	344.7		0	68.94		Alta Gloss Rigid
			2 BU106D	1	Base Unit 1000/600/870	187.17	693.22		0	138.64		Alta Gloss Rigid
			3 WU4556	1	Wall Unit 450/300/560	89.66	332.07		0	66.41		Alta Gloss Rigid
			4 BOH66	1	Built Under Housing 600/600/870	87.96	325.78		0	65.16		Alta Gloss Rigid
			5 CB86DB	1	Corner Base 300 Door/Dw 800/600/870	149.41	553.37		0	110.67		Alta Gloss Rigid
			6 BOH66AGR	1	BOH (120 Fascia) RH End 6/6/870	76.49	283.3		0	56.66		Alta Gloss Rigid
			7 BU63D	1	Base Unit 600/300/870	113.41	420.04		0	84.01		Alta Gloss Premium
			8 CB86DB	1	Corner Base 300 Door/Dw 800/600/870	164.35	608.7		0	121.74		Alta Gloss Premium

- Note that the items selected are now re-priced in their new range – Alta Gloss Premium.
- One of the items that we repriced is showing in yellow with price as zero – which means that this item is not available in the Alta Gloss Premium.

Pricelist: The Symphony Group - Milano Kitchens

Price Band: **Alta Gloss Premium**

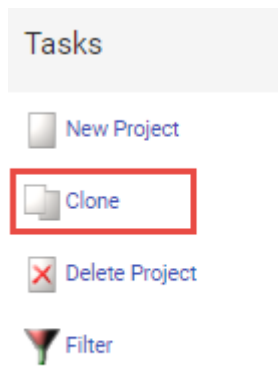
Kitchen Specification: **Accent Kitchen Specification**

Short Pr...	Property	Select	Short Option	Option
100	Door Range		ALGP	Alta Gloss Premium
200	Door Colour		ALGP/4	Gloss Pure White
300	Cabinet Colour		IVOR	Ivory
400	Optional Cabinet Edging Option		WHIT	White

Edit Delete	Select...	Pos	Code	Qty	Description	Cost per unit	Quote per unit	Discount %	Discount	Vat amount	Total Price	Range
			1 BU56F	1	Base Unit F/HT 500/600/870	93.07	344.7		0	68.94		Alta Gloss Rigid
			2 BU106D	1	Base Unit 1000/600/870	205.88	762.52		0	152.5		Alta Gloss Premium
			3 WU4556	1	Wall Unit 450/300/560	0	0		0	0		Alta Gloss Premium
			4 BOH66	1	Built Under Housing 600/600/870	87.96	325.78		0	65.16		Alta Gloss Rigid
			5 CB86DB	1	Corner Base 300 Door/Dw 800/600/870	149.41	553.37		0	110.67		Alta Gloss Rigid

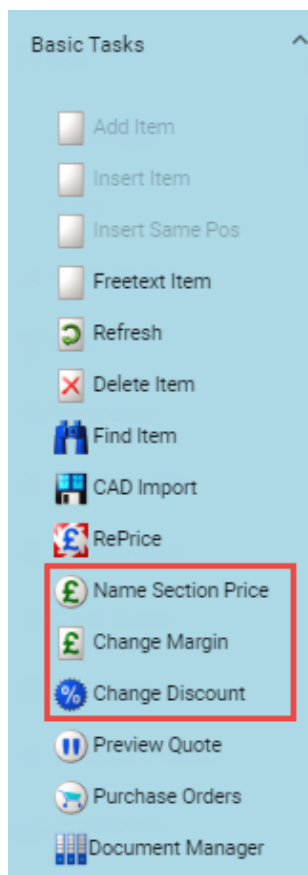
Copying Quotations using Clone Job

You may want to make a copy of a quote before changing ranges or door suppliers, as there is currently no Undo feature available in KBBConnect. To copy any job, ensure that you have no jobs open and that you are in the main **Projects** view.



- Select [Clone Job](#) from the **Tasks** Menu
- The job will be named: xxxx/REV01 and be given **Pending** status

Setting Discounts and Changing your Profit Margin on Individual Projects



Your quote price will be automatically produced using the discounts and margins you have set using the **Terms** tab. However, you may wish to amend your individual quotes, particularly in terms of customer discounts. There are a number of tools in KBBConnect that enable you to control how much you wish to charge, what customer discounts you wish to apply, and what profit you plan to achieve.

In the **Tasks** Pane in the Main Quotation screen these options are:

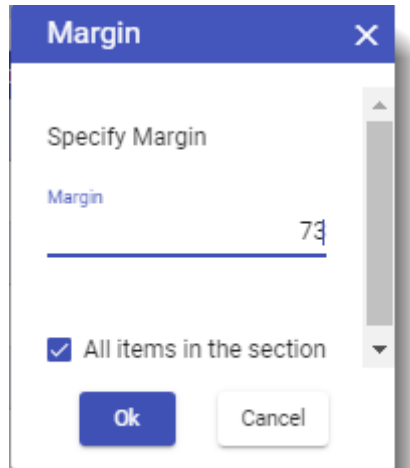
- Name Price for Section
- Change Margin
- Change Discount

Name Price for Section

This displays the price for the current section (ex VAT). Type the new price in for the section and KBBConnect will automatically re-price all the items in the section.

Change Margin

When you select this command, it will display your current profit margin for the item you have selected.



The 'Margin' dialog box has a blue header with the title 'Margin' and a close button. Below the header, it says 'Specify Margin'. There is a text input field labeled 'Margin' containing the value '73'. At the bottom, there is a checked checkbox labeled 'All items in the section'. Below the checkbox are two buttons: 'Ok' and 'Cancel'.

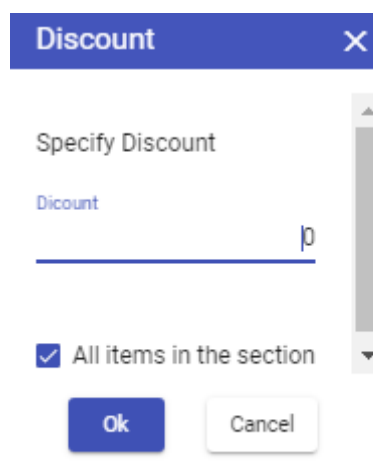
Type over the margin and select **Apply**.

If you wish to change the margin for the entire section, tick the **Apply for the whole section** button.

Change Discount

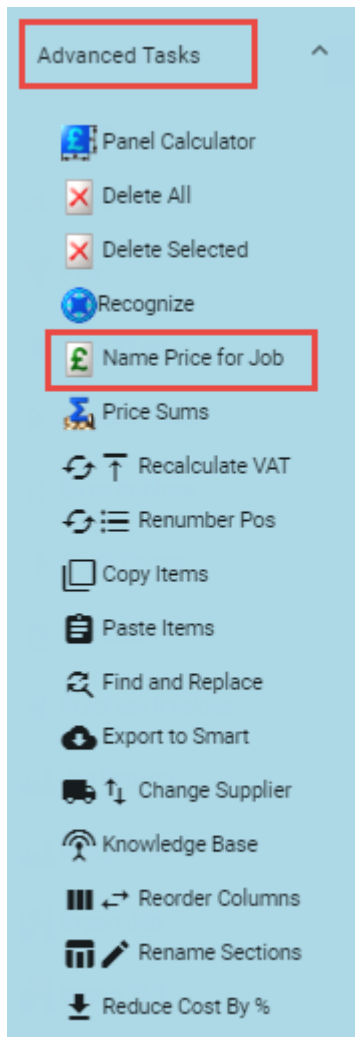
This displays the current discount you are giving to your customer, and as a default for all new quotes the discount will be set to zero.

To apply a discount to the item selected, enter a discount percentage and select the **Apply** button. To apply a discount to the entire section, click the **Apply for the whole section** check box.



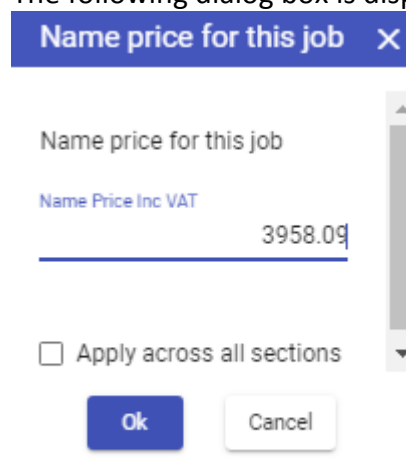
The 'Discount' dialog box has a blue header with the title 'Discount' and a close button. Below the header, it says 'Specify Discount'. There is a text input field labeled 'Discount' containing the value '0'. At the bottom, there is a checked checkbox labeled 'All items in the section'. Below the checkbox are two buttons: 'Ok' and 'Cancel'.

Name Price for Job



In the Advanced Tasks Pane, **Name price for Job** enables you to set a complete price for the job, inclusive of VAT.

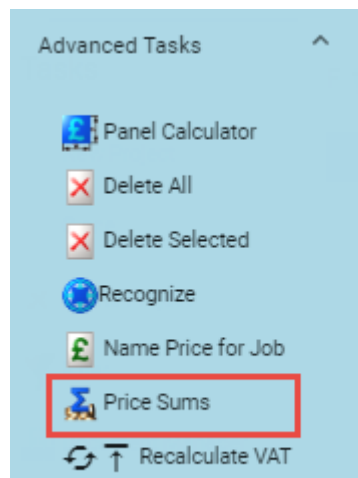
The following dialog box is displayed:



It's advisable to tick **Apply across all sections**, so that a discount is calculated across the whole room, rather than just in the section you are in.

Note: If you select the **RePrice** Button in the Task Pane - **ALL discounts, price and margin changes are reset to the default you have set in the Terms tab.**

Calculating Potential Profit on your Quote



You can see and adjust easily the overall profit you'll make from any potential job in KBBConnect, using the **Price Sums** feature.

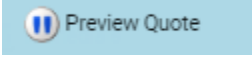
- Select the Advanced Tasks tab
- Select Price Sums
- The Price Sums Information Box will be displayed, as below

Price Sums					
Section	Cost	Quote	Discount	Profit	Margin%
Kitchen	£964.83	£3,573.45		£2,608.62	73
Sink and Taps	£388.50	£729.50		£341	46.74
Appliances	£2,049.26	£3,725.93		£1,676.67	45
Installations	£455	£455			0
Total	£3,857.59	£8,483.88		£4,626.29	54.53
Vat		£1,696.78			
Overall Total		£10,180.66			

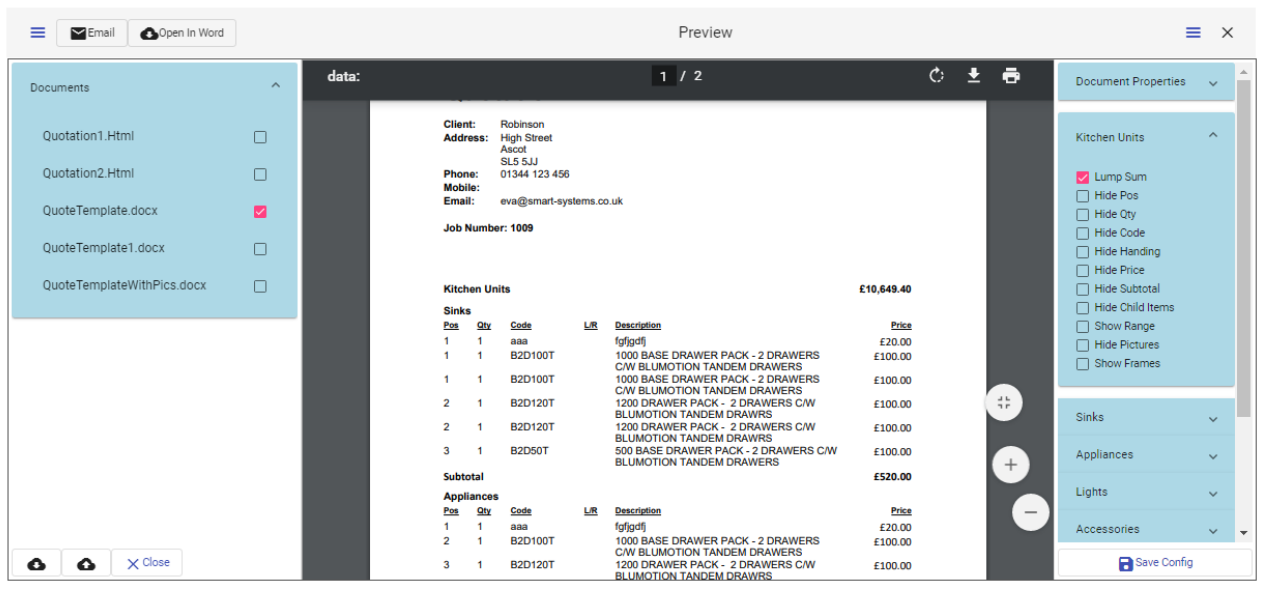
Close

Producing Quotations for your Clients

Once you are confident you are making the right potential margin on the quote, it's ready to go.

1. Select the  button in the **Task Pane**

This action will open a new window showing your quotation for the customer:



There are two formats available for quotations:

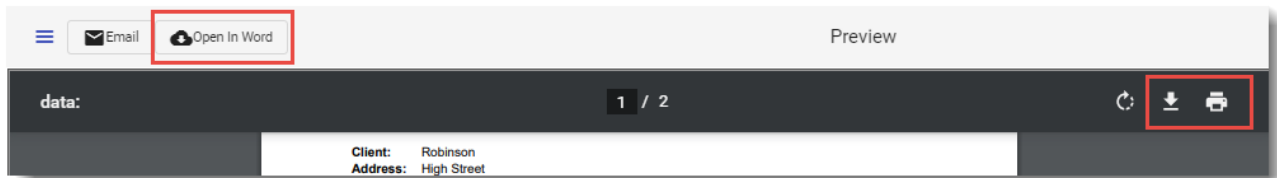
- **Html** format: Configurable using the Configuration Panel on the right of the screen. Here you choose which items to display or hide in your quotation, e.g. you may just want to display a lump sum for certain sections, rather than provide a detailed price breakdown, or not show item codes.
- Alternatively, there are **Microsoft Word format** templates available, to be used as is, or with the flexibility to amend to your needs.

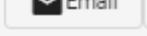
These quotation templates are completely editable using the Configuration Panel as above, but also and can be re-designed in Word. This will enable you to, in effect, create your quotation in exactly the format you require.

TIP: For more information on working with KBBConnect templates in Microsoft Word please see the Quick Guide: [Customising your KBBConnect Quotations, Invoices and Dispatch Notes](#)

2. Once you have the quotation displaying the information you require, you can either print or e-mail it to your client.

To print the quotation, open it in Microsoft Word and print from there.



When you click on the E-mail  button, the quote will be inserted automatically into the e-mail in **pdf** format.

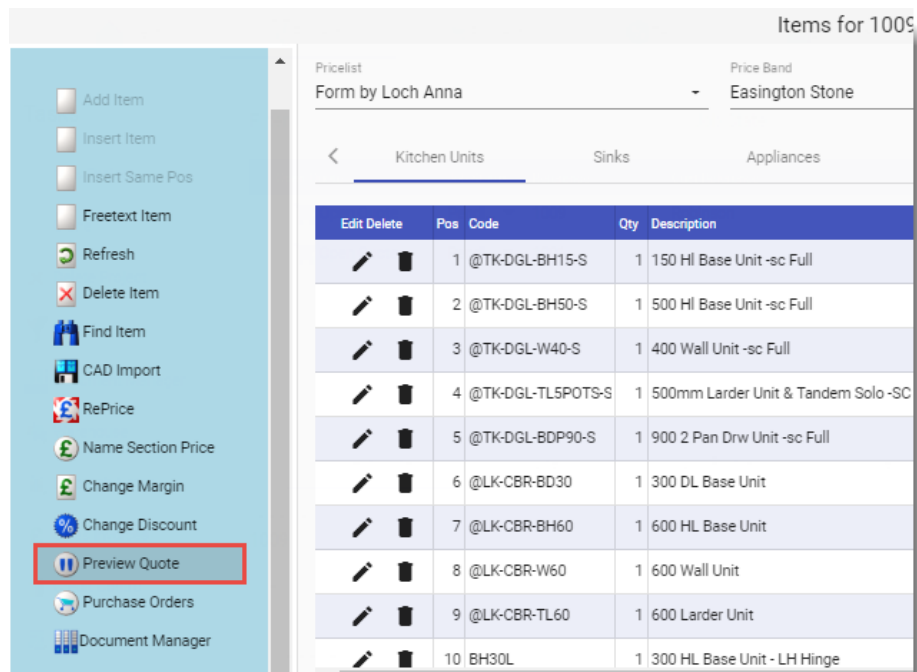
Also, the quote, like every other document you send from KBBConnect, will be inserted into your **Document Manager**, along with the date it was sent.

You can also create an auto signature for KBBConnect, as described in the following section.

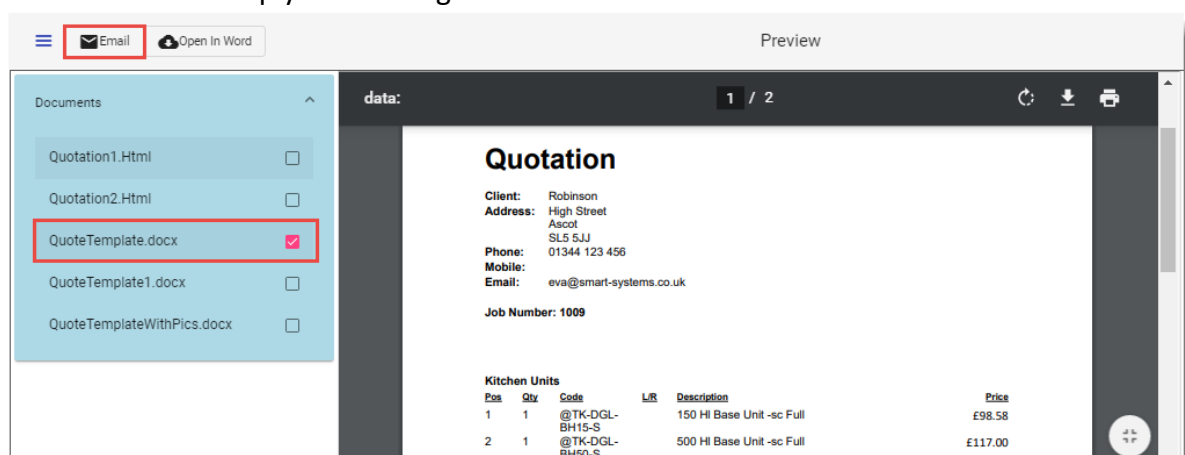
Creating your Auto Signature

KBBConnect offers an automatic signature set up feature for all of your quotes and purchase order emails. You set it up once and it will be available in every quote and purchase order e-mail.

1. Open a live or pending quote. Select **Preview Quotation** as displayed below:

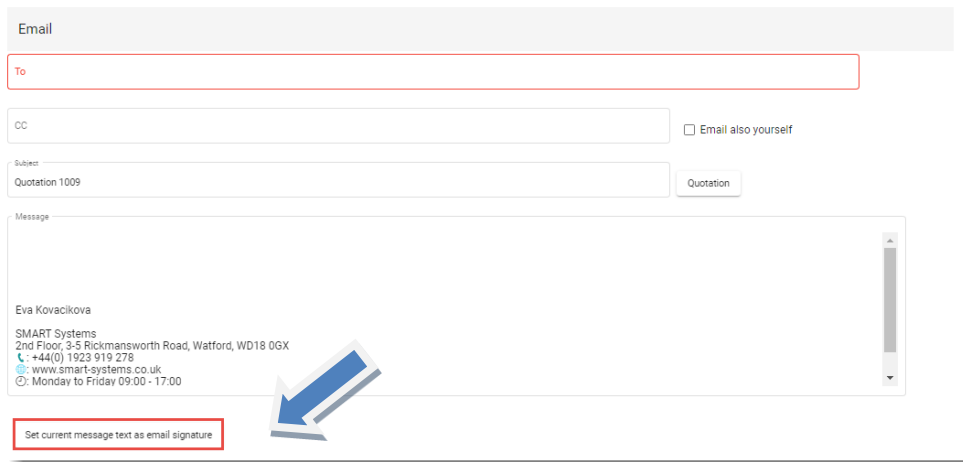


2. Choose the Quotation template you want to use. Click on the **Email** button this is where you will be able to set up your auto signature.



3. A blank draft email will appear. Type or copy your email signature into the draft.

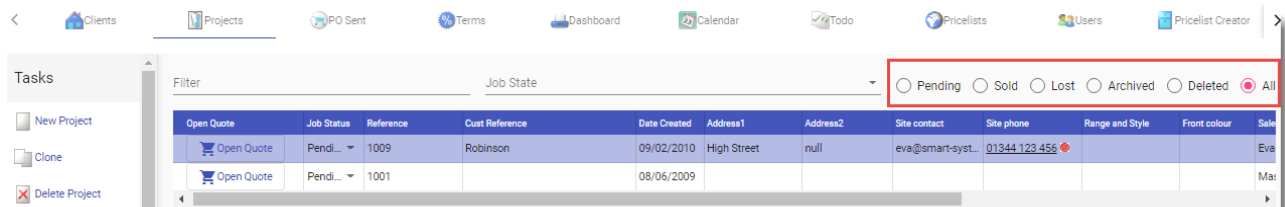
- Click the Set current message text as email signature button.



NOTE: You will only need to set your auto signature once – it will remain in place. If you want to change your auto signature simply follow the above process again.

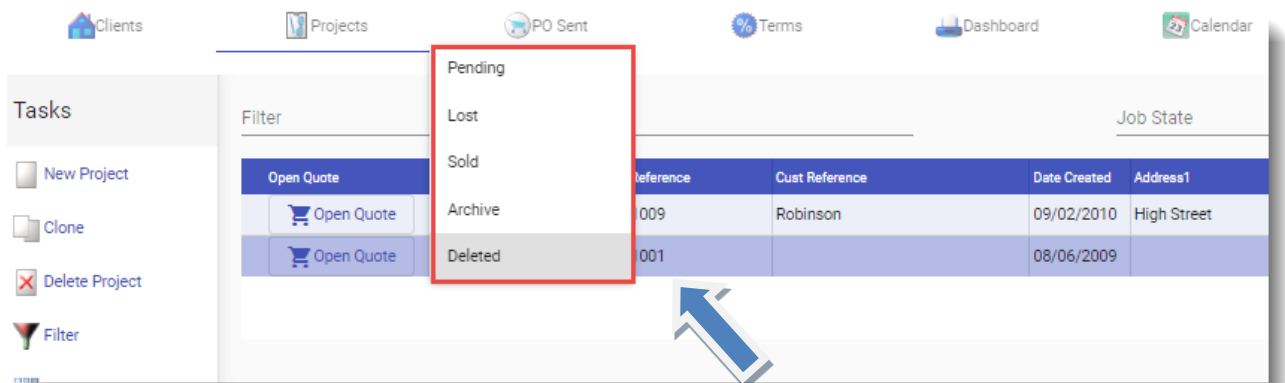
Retrieving Deleted Quotes

Accidents do happen! If you have deleted a quote by mistake these are now retrievable. In the Projects screen the status of each project is categorised as shown below: Pending, Sold, Lost, Archived, All and **Deleted**.



Open Quote	Job Status	Reference	Cust Reference	Date Created	Address1	Address2	Site contact	Site phone	Range and Style	Front colour	Sale
Open Quote	Pendi...	1009	Robinson	09/02/2010	High Street	null	eva@smart-syst...	01344 123 456			Eva
Open Quote	Pendi...	1001		08/06/2009							Mar

- If you delete a job in error, select the **Deleted** radio button. Your deleted job/quote will be displayed
- Retrieve the deleted job by changing its status to either Pending, Sold, Lost or Archived.



Open Quote	Job Status	Reference	Cust Reference	Date Created	Address1
Open Quote	Pendi...	009	Robinson	09/02/2010	High Street
Open Quote	Pendi...	001		08/06/2009	

Document Manager

The Document Manager is:

- A great way of tracking what you've sent and when
- A way to store all documents related to a job in one place.

To use Document Manager:


1. Go to the main **Projects** view i.e.no jobs open


2. Select the Document Manager  Document Manager

You will see the following screen:



Reference	Client Name	Customer Reference	Date	Description
1009	EK Kitchen company	Robinson	09/04/2019 09:46:34	Purchase Order EVO Kitchen Collection
1009	EK Kitchen company	Robinson	09/04/2019 10:23:55	Purchase Order Loch Anna was sent to
1009	EK Kitchen company	Robinson	09/04/2019 10:29:34	Purchase Order Form by Loch Anna was

Note the example above shows the quote was sent out on 9th April. To open and view what you've sent click the  Open button.

To upload other documents related to the job that have not been sent from the KBBConnect system, select the  Upload button. This will take you to your system to find the documents you want to load into KBBConnect.


Creating Purchase Orders and Ordering Goods using KBBConnect

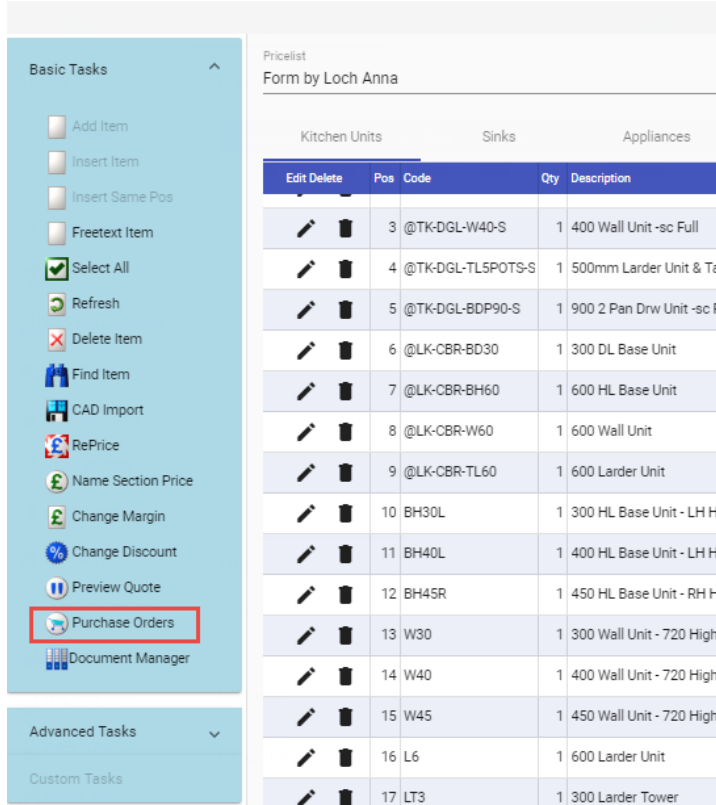
KBBConnect provides a quick and effective way to order and track all you KBB goods from your suppliers. Once you have finalised a quote for a customer and they have placed an order, from this quote you can:

- Create Purchase orders
- Order Goods
- Create Invoices (see Quick Guide)

Orders are made electronically via the KBBConnect system, either direct to suppliers' online portals, or via e-mail to addresses they specify. A record of every order you place is stored within the KBBConnect system.

Creating a Purchase Order

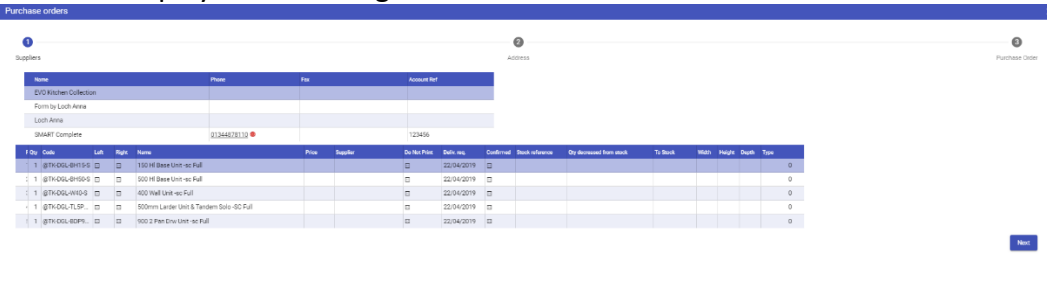
1. In the main Projects view (Projects tab) open the Job you want to order goods for.
2. Select the  Purchase Orders button on the Tasks Menu on the left:



The screenshot shows the KBBConnect interface. On the left, the 'Basic Tasks' menu is expanded, and the 'Purchase Orders' button is highlighted with a red rectangle. The main area displays a 'Pricelist' form by Loch Anna, which is a table of kitchen units, sinks, and appliances. The table has columns for 'Edit', 'Delete', 'Pos', 'Code', 'Qty', and 'Description'. The items listed include various wall units, larder units, and base units.

Kitchen Units			Sinks	Appliances	
Edit	Delete	Pos	Code	Qty	Description
		3	@TK-DGL-W40-S	1	400 Wall Unit -sc Full
		4	@TK-DGL-TL5POTS-S	1	500mm Larder Unit & Ta
		5	@TK-DGL-BDP90-S	1	900 2 Pan Drw Unit -sc P
		6	@LK-CBR-BD30	1	300 DL Base Unit
		7	@LK-CBR-BH60	1	600 HL Base Unit
		8	@LK-CBR-W60	1	600 Wall Unit
		9	@LK-CBR-TL60	1	600 Larder Unit
		10	BH30L	1	300 HL Base Unit - LH H
		11	BH40L	1	400 HL Base Unit - LH H
		12	BH45R	1	450 HL Base Unit - RH H
		13	W30	1	300 Wall Unit - 720 High
		14	W40	1	400 Wall Unit - 720 High
		15	W45	1	450 Wall Unit - 720 High
		16	L6	1	600 Larder Unit
		17	LT3	1	300 Larder Tower

3. This will display the following screen:



The screenshot shows the 'Purchase orders' interface. At the top, there are tabs for 'Suppliers' and 'Address'. Below the 'Suppliers' tab, a table lists suppliers with columns: Name, Phone, Fax, and Account Ref. The table includes entries for 'DJO Kitchen Collection', 'Romby Loch Area', 'Loch Area', and 'SMART Complete'. Below this, a table lists items to be ordered with columns: Qty, Code, Unit, Name, Price, Supplier, Order Price, Order Qty, Customer, Stock reference, Qty decreased from stock, To Stock, Width, Height, Depth, and Type. The table shows several items with their respective quantities and codes.

Here you will see the list of the receiving suppliers. At the bottom of the screen, a list of all the items to be ordered will be displayed, separated by supplier and including position number, quantity and code information.

If **Do Not Order** is selected for an item, e.g. as shown above for Maurice Lay, the item will not appear on the order.

Note: Once the order has been sent, the **Ordered On** column will complete automatically.

4. Select the supplier you wish to order from and click on the **Next** button to proceed. The following orders front sheet screen appears, is displayed, which



The screenshot shows the 'Purchase orders' front sheet screen. It has tabs for 'Suppliers' and 'Address'. The 'Suppliers' tab is active, showing a form for 'Order Ref' (1009/CK Kitchen company/Robinson) and 'Choose PO date' (07/01/2021). Below this, there are sections for 'Default', 'Site Address', 'Warehouse 1', and 'Warehouse 2'. The 'Default' section is highlighted, showing 'High Street' and 'Oxford'. The 'Warehouse 1' and 'Warehouse 2' sections are also visible. At the bottom, there are fields for 'County', 'Postcode', 'Contact', 'Phone', and 'Comments'. A 'Save' button is located at the bottom right.

Requested PO Date Date you are requesting the supplier to deliver the order. Automatically defaults to today's date – change this in the calendar.


Order Ref Automatically completed picking up the job reference/Customer name, but is editable.

Delivery Address Where would you like the goods to be delivered? The default is your address, but change this for your site or warehouse address.

Once delivery address for Default, Warehouse 1 and Warehouse 2 has been entered once, click the **Save** button and this will be stored for future use for all orders. This can be easily amended for individual orders by over-typing. Site address will always pick up information entered for the customer in the main Projects view of KBBConnect.

Comments

Add any information for the supplier in the comments sections to the bottom of the screen. **Set Def** will make whatever is entered in the textbox the default Comments text.

- Select the  button and the Purchase Order to be sent will be displayed. The purchase order can still be edited at this point, by simply clicking anywhere within the order and typing in, editing or deleting text.

Purchase orders

Suppliers

Address

←

→

Email

☐ Show no price
 ☐ Show comments

Purchase Order

Supplier:

SMART Complex

Fax:

Email:

nigel@smartkbb.co.uk

Order Date:

08/01/2013

Account No:

132456

Our Reference:

3809 EK Kitchen company Robinson

Delivery Ref:

08/01/2013

Delivery Address:

High Street
Oxford
OX1 1JG

Invoice Address:

High Street
Oxford
OX1 1JG

EK Kitchen company
High Street, Oxford, OX1 1JG
Phone: 01377 878110

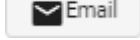
Range Item	Qty	Code	L.R	Name	Price
1	1	BUD100T		1000 BASE DRAWER BACK - 2 DRAWERS C/W BLUMOTION TANDDEM DRAWERS	£100.00
1	1	BUD100T		1000 BASE DRAWER BACK - 2 DRAWERS C/W BLUMOTION TANDDEM DRAWERS	£100.00
2	1	BUD120T		1200 DRAWER PACK - 2 DRAWERS C/W BLUMOTION TANDDEM DRAWERS	£100.00
2	1	BUD120T		1200 DRAWER PACK - 2 DRAWERS C/W BLUMOTION TANDDEM DRAWERS	£100.00
3	1	BUD100T		1000 BASE DRAWER BACK - 2 DRAWERS C/W BLUMOTION TANDDEM DRAWERS	£100.00
1	1	asa		550mm	£10.00
1	1	BUD100T		1000 BASE DRAWER BACK - 2 DRAWERS C/W BLUMOTION TANDDEM DRAWERS	£100.00
3	1	BUD120T		1200 DRAWER PACK - 2 DRAWERS C/W BLUMOTION TANDDEM DRAWERS	£100.00
4	1	BUD100T		1000 BASE DRAWER BACK - 2 DRAWERS C/W BLUMOTION TANDDEM DRAWERS	£100.00
4	1	1.0 X 6 HPP		MAURICE LAY PERATORP 1800 X 600 HPP 1 1/2 BOARD - BEIGH GLOSS - DICK WRAPPING & 1 FREE CUTT @ SEND ALL PRICES	£250.00
Subtotal					£870.00

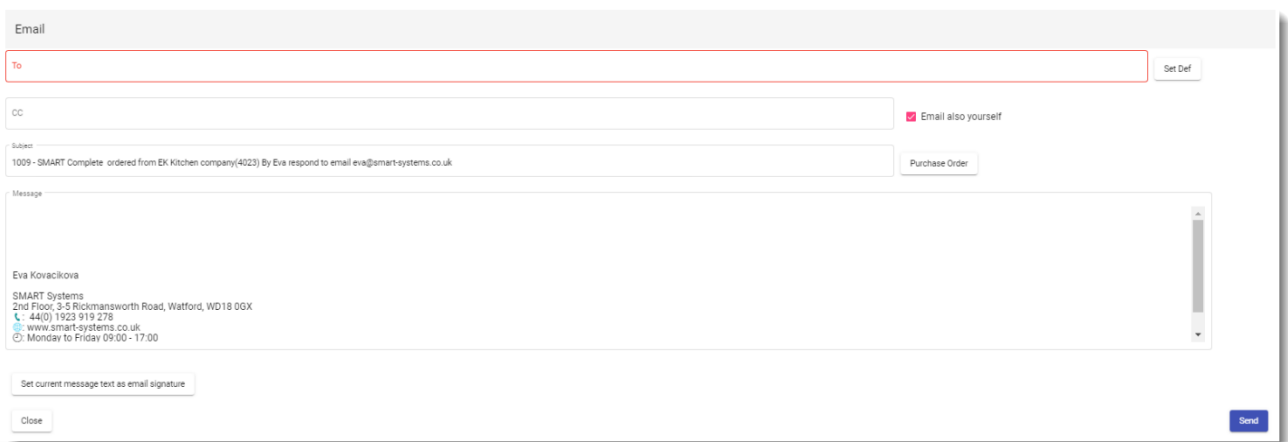
Sending your Order to your Suppliers

E-mailing Purchase Orders/ Direct Electronic Ordering

With KBBConnect, you can e-mail your orders to your suppliers direct from the system. When you send orders using KBBConnect you will receive confirmation of sending and the Purchase Order documents will be stored with the job, so you can easily retrieve them.

To order using KBBConnect:

1. When you ready to send the Purchase Order to your supplier, select the  button and an e-mail screen will open as shown:

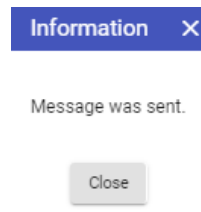


- To:** In the To field, type the e-mail address of your supplier (if they have provided an e-mail address it will already be in the To field). **Set Def** sets the e-mail address for the next time you e-mail this supplier.
- CC:** **Email Also Yourself** is ticked to send a copy of the mail and PO to your registered e-mail address. Remove the tick as required.
- Subject:** To save you time the subject area is automatically completed with order information. Overwrite this as required.

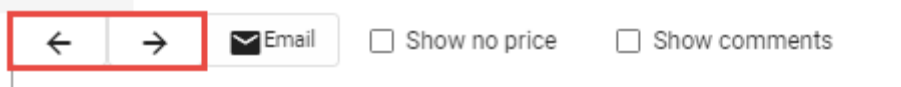
Order: The Purchase Order is automatically attached to the e-mail in pdf format. [Add attachment](#) is available should you wish to attach another file.

Message: Type your required text within the message body and;

Click the **Send** button - KBBConnect will attach the purchase order for that supplier and deliver it automatically. The following message box will appear confirming that your order has been sent:



2. Select arrows to **Next Order** to move to the next Purchase Order and **Previous Order** go back through the orders:

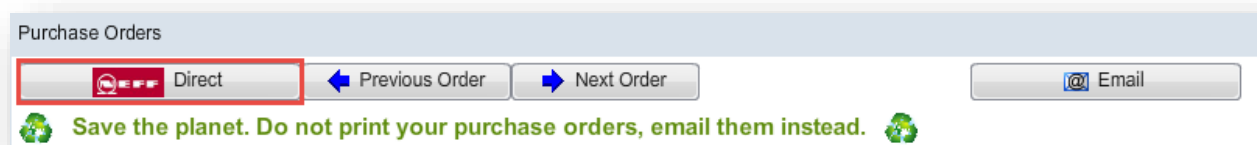


Direct Electronic Ordering to Suppliers' on-line ordering systems



A growing number of suppliers have on-line ordering portals, to which KBBConnect can connect. This means that your orders can go directly into their system from KBBConnect.

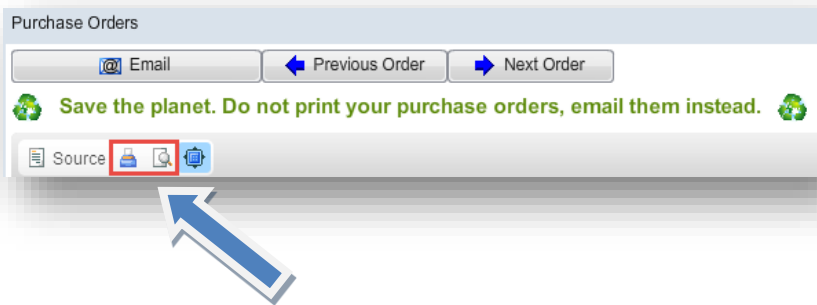
To use Direct Ordering via KBBConnect, you will require a Tradeplace account – see [Quick Guide](#) to assist you in setting up an account.

Once you have a Tradeplace account and wish to order from suppliers with on-line trade portals, you will see the additional buttons in your Purchase Order screen. In the following example we are ordering some Neff goods – note the **Neff Direct** button. You can still e-mail the order if you wish, but the direct button enables your order to go straight into their system.



Printing Purchase Orders

If you wish to print your purchase orders from KBBConnect, this is done in the Purchase Order screen. select the Print Preview  button to see the order before printing and the Print button  to print directly.



Tracking Purchase Order Status

KBBConnect has a number of ways to track the status of your projects. Once you have sent a purchase order for goods, you will see a copy of that order in:


- **Document Manager**
- **PO Sent** tab
- **Job Summary** tab with in the main **Projects** view

Document Manager for Purchase Orders

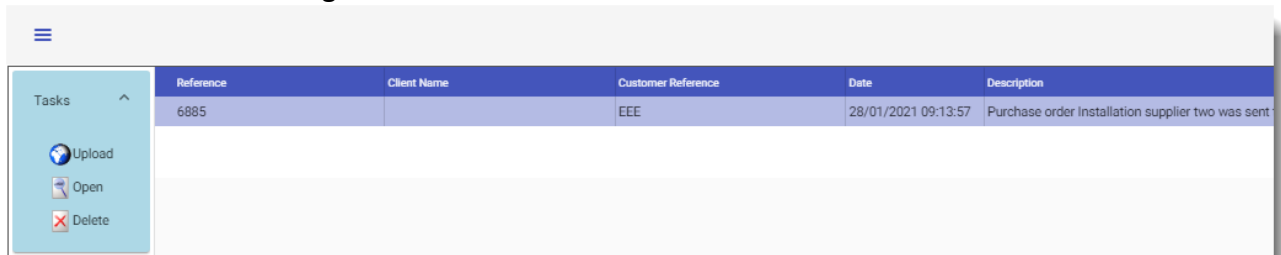
As mentioned previously, the Document Manager is a great way to store and easily access all documents related to each job you create in the system.

- Any document, e.g. quote, purchase order, invoice you send from the system is automatically stored in the Document manager.
- You can load any file related to a job in the Document Manager – e.g. photos, CAD drawings.
- All documents are date stamped, so it provides an easy way to track what you've sent and when.




To use the Document Manager:

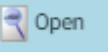
1. Go to the main **Projects** view i.e.no jobs open
2. Select the Document Manager  [Document Manager](#) command


You will see the following screen:



Reference	Client Name	Customer Reference	Date	Description
6885		EEE	28/01/2021 09:13:57	Purchase order Installation supplier two was sent

Tasks
 Upload
 Open
 Delete

Note the example above shows purchase orders sent on 22nd July. To open and view what you've sent click the  button.

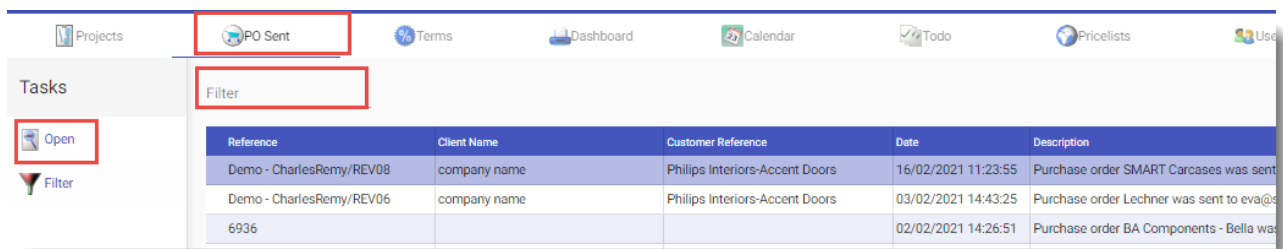
To upload other documents related to the job that have not been sent from the KBBConnect system, select the  button. This will take you to your system to find the documents you want to load into KBBConnect.

PO Sent Tab



All Purchase Orders sent from your KBBConnect accounts are displayed here. The list can be sorted by clicking on any column headers, by Project Reference number, Client Name, Purchase Order name, the Date sent and the value of the Purchase Order.

Orders can be filtered using the [Filter](#) button and also within a date range, to show Purchase Orders that were sent within a specific timeframe. Additionally, the Supplier Filter is a list filter (here showing All in the drop-down list) will display Purchase Orders sent to a specific supplier.

The [Open](#) button in the Tasks Menu opens the selected Purchase Order in a PDF format. The [Refresh](#) List updates the PO Sent list.



Reference	Client Name	Customer Reference	Date	Description
Demo - CharlesRemy/REV08	company name	Philips Interiors-Accent Doors	16/02/2021 11:23:55	Purchase order SMART Carcases was sent
Demo - CharlesRemy/REV06	company name	Philips Interiors-Accent Doors	03/02/2021 14:43:25	Purchase order Lechner was sent to eva@s
6936			02/02/2021 14:26:51	Purchase order BA Components - Bella was

Tasks
 Open
 Filter

Job Summary tab with in the main Projects view

You can also track what PO's have been sent and whether the supplier has confirmed delivery using the **Job Summary** tab within the tab, as shown below.

Client/S...	Site	Job Pro...	Spec 1	Spec 2	Job Pro...	Job Su...	Terms	Quotation
						Job Summary		
Supplier Name		Qty	Order Req Date		Confirmed Date			
		1						
SMART Carcases		4	22/07/2014		22/07/2014			
SMART Complete		5	22/07/2014		22/07/2014			
Porcelanosa		2	22/07/2014		22/07/2014			
Neff UK Ltd G7C - MPAAR		5						

Once a delivery date has been confirmed by the supplier, the Confirmed Date and Number can be completed using the **Warehouse** command in the **Tasks** Menu.

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:

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

or

Telephone Number: +44 (0)1923 919 278