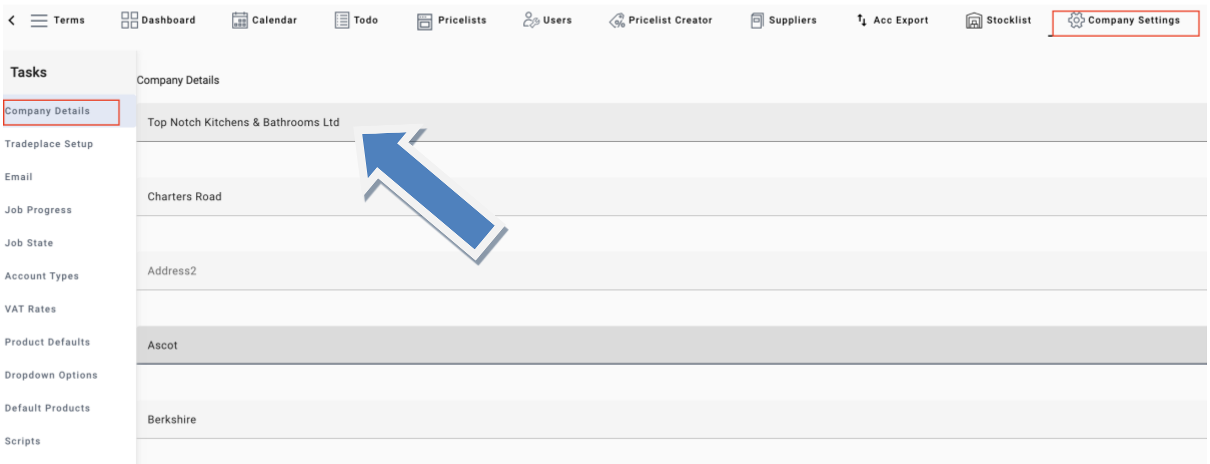
Setting Up KBBConnect for Your Company

One of the first steps in setting up KBBConnect is to set-up is to set up your company specific information, e.g. address and standard terms. This is all done in one place, the **Company Details** Tab, as shown below:



There are 11 vertical tabs within the **Company Details** Tab, as follows:

Company Details: Enter your Company name and address information, VAT and company e-mail. This information can be displayed on your quotations and invoices, as required.

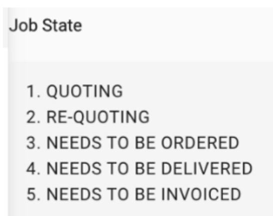
Tradeplace Setup: This is where you can apply to set up a **Tradeplace Account** in order to use direct electronic ordering to Miele and the BSH Group. Click on **Request Electronic Ordering Setup** and follow the on-screen instructions.

Email Setup: Complete the information required so that Quote and Order e-mails you generate in KBBConnect display your name as the sender, as opposed to SMART Systems.

This is important because **if you do not complete the SMTP details any e-mail you send from the KBBConnect system will state that it was sent from info@smart-systems.co.uk.** Also, for Purchase Orders – all replies from your suppliers will come automatically to SMART rather than to you. See Appendix, **Synching to your Google Calendar**.

Job Progress: You can set your Job Progress tick boxes – to track what stage is each job. Note: You can only have 15 ticks and this needs to be setup before you start using the system. If you change them some time after the tick will stay ticked only the name of the field will change.

Job State: Here you can populate your Job State statuses.



Account Types: Here you can populate your Account Types

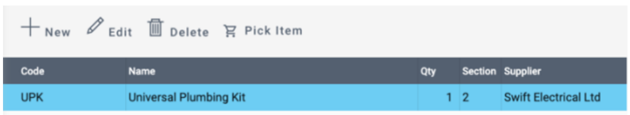
VAT Rates: The system will automatically be set with the UK T1 code - 20% VAT rate. If you wish to change any VAT rate, select the appropriate rate and type in the number you require.

Product Defaults: This section allows you to set your default terms and text for your KBB quotations. These will appear in every quotation and set the payments terms for every invoice, i.e. required deposit, interim payments and completion payment as you wish to show on the quotation.

NOTE: You can change terms for any individual project within that project. **Product Defaults** is what you set for the majority of your projects.

Dropdown Options: These are a great feature and enable you to customise KBBConnect in terms of tracking your Installation/Calendar Status, marketing on an ongoing basis and also amending your specific *supply and fit* options for your products. See section heading: **Improved Lead Tracking.**

Default Products: Here you can add items you would like to have on any job you create on the system. Click on Pick Item and select supplier the items are coming from and add item in. Edit each item and change what section you want the item to be added in.



Code	Name	Qty	Section	Supplier
UPK	Universal Plumbing Kit	1	2	Swift Electrical Ltd

Section ID	Description
1	Kitchen Units
2	Sinks
3	Appliances
4	Lights
5	Accessories
6	Worl Description ng
7	Fabrication charges
8	Utility Units
9	Installation

Scripts: Here you can choose your default script you want to use for CAD Import.

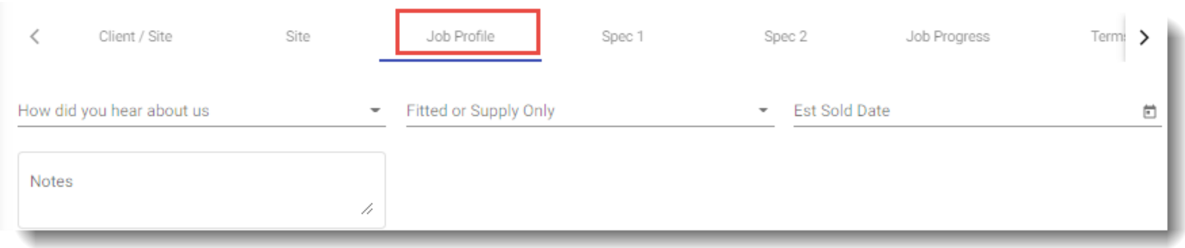
There are two further steps in the set-up of KBBConnect for your company:

1. Downloading your suppliers' pricelists: Accessing your Supplier Pricelists in KBBConnect
   and;
2. Setting your terms (*Discounts and Margins*) for your projects, so that when you quote a job, your buying costs and selling prices will be automatically calculated :
   Setting you Discounts and Margins in KBBConnect

Appendix

Improved Lead Tracking - Job Profile Tab

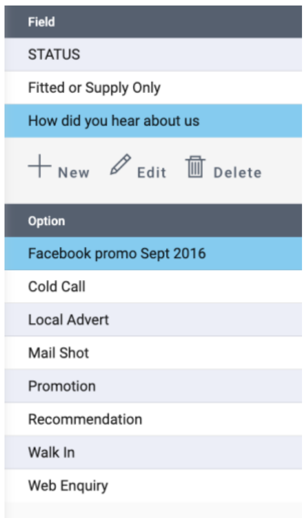
If you run promotions or advertising campaigns it's likely that you will want to track the number of potential clients responding to these, so in KBBConnect you can alter the **How did you hear about us** field in the **Job Profile** tab.



To customise the **How did you hear about us** field:

1. Select the **Company Details** tab
2. Select the **Dropdown Options** command
3. Select HOW DID YOU HEAR ABOUT US
4. Select the **New** button to add in items, e.g. Facebook Promo Sept 2016

Note: Select the **Edit** button to amend and the **Delete** button to remove



Note: The same process is followed to add or amend FITTED OR SUPPLY ONLY or STATUS.

You will see your changes updated in KBBConnect after you have either refreshed or re-logged in to the system.

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