

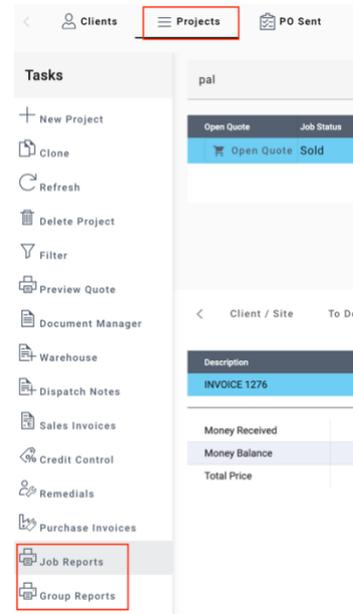
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Business and Management Reporting in KBBConnect

KBBConnect provides you with a wealth of business and management data to help you make critical business decisions. You can access key performance information at the click of a button.

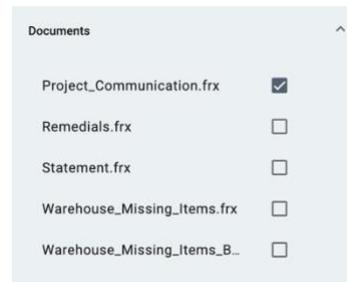
The system will analyse much of the information you have already entered into the KBBConnect system. Reports are accessed in the main **Projects Tasks**. There are **Job Reports** which are specific to the individual project selected **Projects View** and also **Group Reports**, which analyse data from all of your projects.



Job Reports

In KBBConnect you can access the reports specific to the job you have highlighted in the main **Projects Tasks** menu on the left side of Projects View and selecting **Job Reports**.

There are four reports currently available in the Job Reports:



Project Communication

List of all the project communication with the customer – emails, SMS, phone calls






Top Notch Kitchens & Bathrooms Ltd

Charters Road, Ascot, Berkshire, SL5 7ET
Phone:01344 621260

15/08/2024
Page:1

Project Communication

Client Palmer
Address The White Cottage
Bracknell

Phone 01344 878110
Mobile
Email

Reference: 1259/REV01

Action	Date	Comments	Name
Email Incoming	15/08/2024	Email	Christine Jones

Remedials Report

This report displays all remedial items ordered for the particular project. It displays the description of the items, date the remedial was created and the completion date, if completed.



Top Notch Kitchens & Bathrooms Ltd

Charters Road, Ascot, Berkshire, SL5 7ET
Phone:01344 621260

15/08/2024
Page:1

Remedial Items

Client Top Notch Kitchens & Bathrooms Ltd
Address The White Cottage
 Bracknell

Phone 01344 878110
Mobile
Email

Reference: 1259/REV01

Description	Created	Completed
1:BU103F:Base Unit F/HT 1000/3/870	14/08/2024	

Statement Report

This report is a credit control report that gives information regarding the total job price, how much of the job has been invoiced, how much the customer has paid and how much the customer owes.



Top Notch Kitchens & Bathrooms Ltd

Charters Road, Ascot, Berkshire, SL5 7ET
Phone:01344 621260

15/08/2024
Page:1

Statement

Client Top Notch Kitchens & Bathrooms Ltd
Address The White Cottage
 Bracknell

15/08/2024
Statement Date

Phone 01344 878110
Mobile
Email

Reference: 1259/REV01

Invoice No.	Invoice Date	Invoiced Amount	Amount Paid	Amount Paid On	Amount Due
INVOICE 1276	14/08/2024	2,613.68	2,613.68	15/08/2024	0.00
Total Owed					0.00
Project Total Price					6,534.20
Overall Total Owed					3,920.52

Warehouse Missing Items

This report shows the items ordered but *not delivered* yet for the Project. It shows the suppliers information, items description, the date the items have been requested and the confirmation date.

Top Notch Kitchens & Bathrooms Ltd
Charters Road, Ascot, Berkshire, SL5 7ET
Phone:01344 621260

15/08/2024
Page:1

Warehouse Missing Items

Client Top Notch Kitchens & Bathrooms Ltd
Address The White Cottage
 Bracknell

Phone 01344 878110
Mobile
Email

Reference: 1259/REV01

Blanco

Code	Description	Req Date	Conf Date
BL467616	Blanco Modex M-60 Module Silgranit ♦ Puradur li ♦ Rh Bowl Champagne	13/08/2024	
BL210223	Blanco Drainer S/st	13/08/2024	

Neff

Code	Description	Req Date	Conf Date
G4655X7GB	Neff Fully Integrated Series 4 A+ 177cm High Freezer. Fixed Hinge System With Softclose Doors. Frost Free System. Led Touch Control Electronic. Led Interior Lighting. Superfreeze Function. Glass Shelves Between Dr	13/08/2024	
N24K30N0	Neff Domino Hob With Front Controls Bevelled Design Trim Series 4 30cm, 2 Gas Burners, Flame Failure, Cast Iron Pan Supports	13/08/2024	
B14M62W0GB	Neff Single Oven - Drop Down Door White Series 1 A Circotherm Multifunction	13/08/2024	

Warehouse Missing Items By Tab Report

This also shows the items ordered but *not delivered* yet for the Project, but it is organised by Tab. These are the tabs you have set up in your KBBConnect Project view, e.g. Kitchen, Sinks & Taps, and Appliances.

Top Notch Kitchens & Bathrooms Ltd
Charters Road, Ascot, Berkshire, SL5 7ET
Phone:01344 621260

15/08/2024
Page:1

Warehouse Missing Items

Client Top Notch Kitchens & Bathrooms Ltd
Address The White Cottage
 Bracknell

Phone 01344 878110
Mobile 5
Email

Reference: 1259/REV01

Kitchen Units

Code	Description	Supplier	Req Date	Conf Date
BU106F	Base Unit F/HT 1000/600/870	The Symphony Group - Milano Kitchens	13/08/2024	16/08/2024
BU106DGL	Base Unit LH End 1000/600/870	The Symphony Group - Milano Kitchens	13/08/2024	16/08/2024

Sinks

Code	Description	Supplier	Req Date	Conf Date
BL210223	Blanco Drainer S/st	Blanco	13/08/2024	
BL467616	Blanco Modex M-60 Module Silgranit ♦ Puradur li ♦ Rh Bowl Champagne	Blanco	13/08/2024	

Group Reports

Group Reports will analyse the data from all your KBBConnect Jobs. It is possible to filter some of the Group Reports and for these reports a separate dialogue box will appear with filter options. There are many Group Reports available with KBBConnect, including operational and financial reporting for both internal and external use.

Documents	
AChooseReport.frx	<input checked="" type="checkbox"/>
Client Report.frx	<input type="checkbox"/>
ConversionRate.frx	<input type="checkbox"/>
Deliveries_To_Warehouse.frx	<input type="checkbox"/>
Deliveries_To_Warehouse_By_...	<input type="checkbox"/>
Job_Margin_Analysis.frx	<input type="checkbox"/>
Marketing.frx	<input type="checkbox"/>
Monthly_Lost_Jobs_By_Sales...	<input type="checkbox"/>
Monthly_Sales_By_Salesman...	<input type="checkbox"/>
Not_Completed_Remedials.frx	<input type="checkbox"/>
Pipeline.frx	<input type="checkbox"/>
Profit_Report.frx	<input type="checkbox"/>
Sales_Invoices_Raised.frx	<input type="checkbox"/>
Supplier_Spend.frx	<input type="checkbox"/>
Who_Owes_Me_Money.frx	<input type="checkbox"/>

Client Report

Client report will show you list of your customer jobs with address, contact details, marketing type and all jobs with status and product info.

Client Report														
Title	Initial	Client Name	Address1	Address2	City	County	Postcode	Phone	Mobile	Email	How did you hear about us	Job Reference	Status	Product
		SMART Kilchen Co	North Street		Ascot	Bershire	SL5 7PW	01344 878110				1009	Pending	Kitchen
												1010	Pending	Kitchen
												1011	Pending	Kitchen

Conversion Rate Report

ConversionRate.frx is a useful management report for analysing key performance statistics for each sales person/designer: how many leads were converted, sales trends etc.

This report is filtered within a date range you specify, by entering the From and To dates as shown and selecting **OK**.

From	<input type="text" value="16/08/2024"/>
To	<input type="text" value="31/12/2024"/>
<input type="button" value="OK"/> <input type="button" value="Cancel"/>	

Conversion Rates

Opportunities Received
From:01/01/2024
To:31/12/2024

- The **REC** field is the number of projects in that period,
- **SOLD** is the number of jobs changed to **SOLD** status within the date period and
- **CR** is the conversion rate percentage.

Salesman	2024/01			2024/02			2024/03			2024/04		
	REC	SOLD	CR	REC	SOLD	CR	REC	SOLD	CR	REC	SOLD	CR
Charles	19	2	10.53%	8	2	25.00%	83	5	6.02%	11	1	9.09%
Daniel Neville	15	0	0.00%	7	1	14.29%	11	0	0.00%	9	0	0.00%
Eva			0.00%			0.00%	31	2	6.45%	1	0	0.00%
Margo	1	0	0.00%	1	1	100.00%			0.00%			0.00%
Ryan Prior	1	0	0.00%	1	0	0.00%			0.00%			0.00%
Total	36	2	5.56%	17	4	23.53%	125	7	5.60%	21	1	4.76%

Deliveries to Warehouse

This report is a very useful report for warehouse management. It shows all the items that have been ordered – through the **Purchase Orders** screen, and not yet received.

The report gives details of the items ordered, including the project reference, client name, item codes and description. You will also see the delivery request date (that is the date the customer wants the goods in) and the confirmation date.

Deliveries To Warehouse

<u>Reference</u>	<u>Client Name</u>	<u>Code</u>	<u>Description</u>	<u>Req Date</u>	<u>Conf Date</u>
Sheraton					
2903/08-	Sheraton Wood Frame	PLPNT6	Plinth 3000X150X15	28/08/2024	
2903/08-	Sheraton Wood Frame	CUT600ST	Plastic Cutlery Insert 600	28/08/2024	
2903/08-	Sheraton Wood Frame	CB3PNT6	36MM SQ CORN/PEL	28/08/2024	
2903/08-	Sheraton Wood Frame	BEL90	900mm BELFAST SINK	28/08/2024	

Deliveries To Warehouse by Customer

<u>Reference</u>	<u>Supplier Name</u>	<u>Code</u>	<u>Description</u>	<u>Req Date</u>	<u>Conf Date</u>
oconner					
2818 / CN-34-	The Symphony Group - Urbano Bedrooms	2DR6	Double Robe Run (1x	30/08/2024	

Job Margin Analysis

Job Margin Analysis

01/01/2024-31/12/2024

Section	Cost	Quote	Discount	Quote After Discount	Margin%
Job Reference:	1259/REV01				
Client Name:	Top Notch Kitchens & Bathrooms Ltd				
Kitchen Units	1,196.01	2,173.52	0.00	2,173.52	44.97
Sinks	718.90	1,179.49	0.00	1,179.49	39.05
Appliances	1,345.00	2,414.96	489.10	1,925.86	30.16
Lights	0.00	0.00	0.00	0.00	0.00
Accessories	0.00	0.00	0.00	0.00	0.00
Worktops and Flooring	0.00	0.00	0.00	0.00	0.00
Fabrication charges	0.00	0.00	0.00	0.00	0.00
Utility Units	0.00	0.00	0.00	0.00	0.00
Kitchen Remedials	231.87	0.00	0.00	0.00	0.00
Kitchen Additions	83.15	166.30	0.00	166.30	50.00
Installation	0.00	0.00	0.00	0.00	0.00
Total 1259/REV01:	3,574.93	5,934.27	489.10	5,445.17	34.35
Overall Total:	3,574.93	5,934.27	489.10	5,445.17	34.35

Marketing Report

This report can help you direct your marketing budget by tracking how your customers found out about your business.

Marketing Report

Oportunities Received
From: 01/01/2014
To: 31/06/2014

Month Received	How did you hear about us		Marketing Type	
2014/01		15.00		58.00
	Recommendation	1.00	Facebook Campaign May 2014	1.00
	Total	16.00	Local Advert	4.00
2014/02		19.00	Recommendation	4.00
	Local Advert	2.00	Walk In	10.00
	Total	21.00	Total	77.00
2014/03		13.00		
	Recommendation	1.00		
	Walk In	2.00		
2014/04	Total	16.00		
		9.00		
	Recommendation	1.00		
	Walk In	4.00		
	Total	14.00		

If the lead type has not been specified in the Job Profile tab you will just see number of unspecified leads as part of the report.

To Populate the Marketing Report:

1. Create a quote for the customer
2. Select the **Job Profile** tab at the bottom of the main **Project** view and select the drop-down box **How did you hear about us** and select the appropriate option
3. Select the drop down box **Fitted or Supply Only** and choose whether the customer wants the Project to be fitted or Items only.
4. Select the **Est Sold Date** by clicking on the calendar button next to the box.

By entering this information that you will be able to produce an accurate **Marketing** report.

< Client / Site To Do Site Job Profile Specification Spec 2 Job Progress Project Communication Terms Quotation Items Overview Delivery

How did you hear about us ▾

Fitted or Supply Only ▾

Est Sold Date

Notes

In this report, leads are grouped by their creation date. The creation date is a good way for managers to track trends in the behaviour of leads, since leads created during the same time period are typically subject to the same campaigns and marketing approaches. By grouping leads by month, managers will be able to drill down into specific months or campaign types to determine how successful a campaign was.

The **Marketing** report will pick up this information for all the jobs created between the dates specified at the beginning of the report. The report will provide information about the total leads received each month and the total number of leads received from each lead source. This kind of

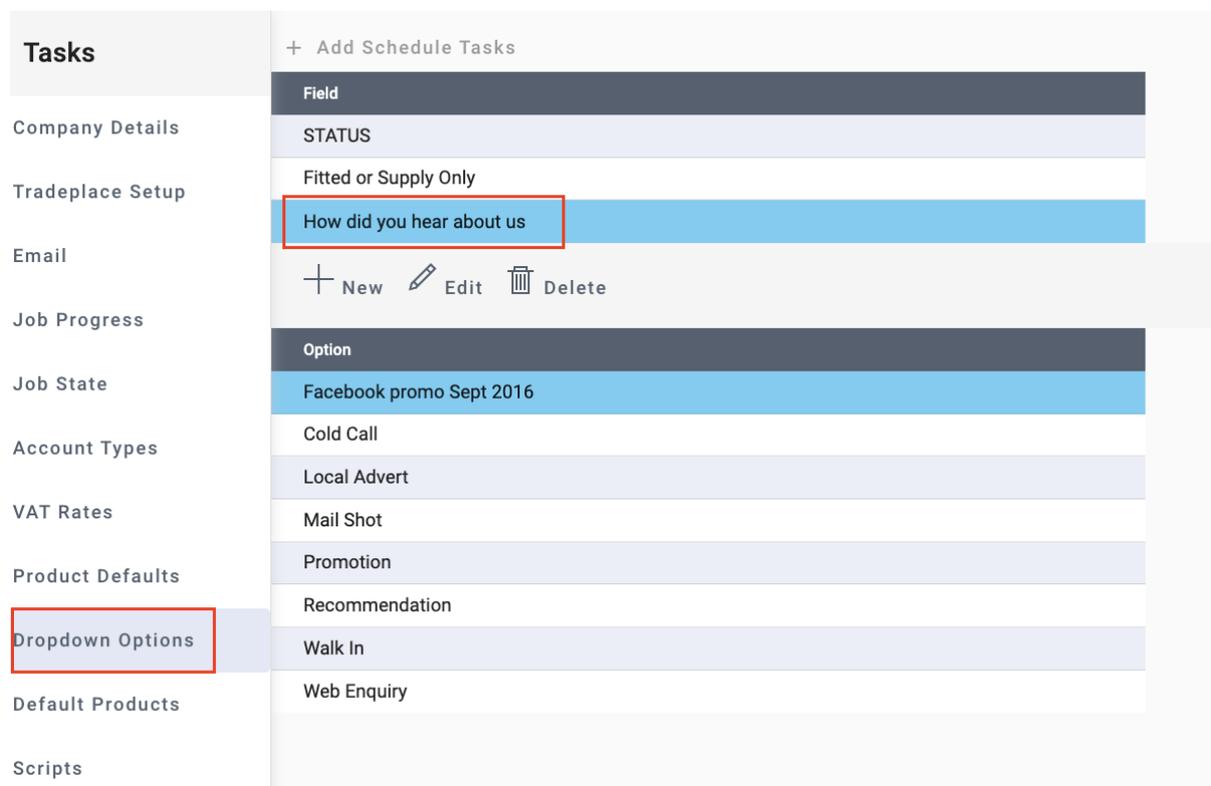
information is crucial to track monthly growth of leads and accurately track which marketing methods are performing best.

Customising your Lead Sources

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 in **Tasks** – Dropdown Options
3. Select **HOW DID YOU HEAR ABOUT US**
4. Select the **New** button to add in items, e.g. Radio June 6th -8th 2023 or
Select the **Edit** button to amend and the **Delete** button to remove



The screenshot shows the 'Company Settings' page with the 'Tasks' tab selected. The 'How did you hear about us' field is highlighted in blue. Below it, the 'Dropdown Options' category is highlighted with a red box. The list of options includes 'Facebook promo Sept 2016', 'Cold Call', 'Local Advert', 'Mail Shot', 'Promotion', 'Recommendation', 'Walk In', and 'Web Enquiry'. Action buttons for 'New', 'Edit', and 'Delete' are visible below the list.

The same process is followed to add or amend **FITTED OR SUPPLY ONLY**.

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

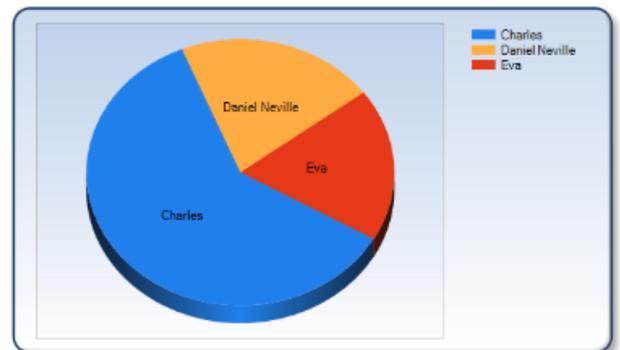
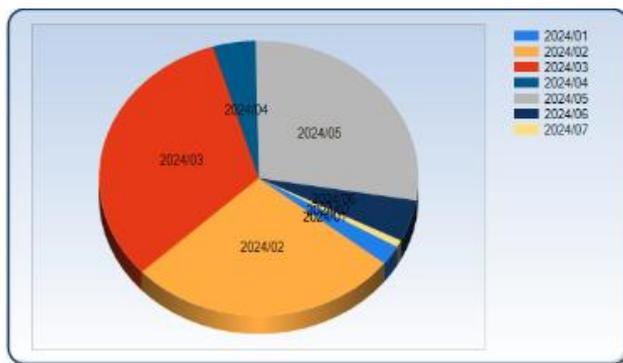
Monthly Sales by Salesmen Report

This report enables you to view sales figures, broken down by Salesperson, job reference and client name. Information displayed is: Estimated cost, Sell Price and the Estimated Profit generated by the salesperson. This information is again based on Projects set to **SOLD** status in Projects View.

Monthly Sales By Salesman

Month Sold	Salesman Name	Job Reference	Client Name	Est Cost Price	Sell Price	Est Profit
2024/01	Charles	CK8145/REV01	Matteo Rossi	88.83	240.86	152.03
		CK8153	Matteo Rossi	495.48	990.96	495.48
		Total		584.31	1,231.82	647.51
	Total		584.31	1,231.82	647.51	
2024/02	Charles	CK8114/REV01	Hazel Armstrong	1,359.96	2,673.76	1,313.80
		CK8164/P1	BOB THE BUILDER	513.99	1,027.98	513.99
		CK8180	Mira Shah	1,029.12	2,058.24	1,029.12
		Total		2,903.07	5,759.98	2,856.91
	Daniel Neville	8162	Bond	4,469.88	9,019.04	4,549.16
		Total		4,469.88	9,019.04	4,549.16
	Total		7,372.95	14,779.02	7,406.07	
		CK8196	Mira Shah	748.69	1,497.37	748.69

This information is also available in graphical format, as shown on the next page:



Not Completed Remedials

This report displays all items entered in KBBConnect Remedials that are incomplete i.e. not marked complete.

The report displays the Job Reference, Client Name, Salesman Name and how much money is outstanding from the customer.

Not Completed Remedials

Reference	Client Name	Salesman	Money Owe	Created On	Del. Requested	Goods In
1029	Top Notch Kitchens &	Christine Jones	£1,990.79			
	CMG633BB1B:Bosch Compact Oven With Microwave Black Fascia Serie 8			20/09/2016		
	6 Functions, Microwave, Mw Combination Options, Tft, Colour Display, Softopen/close					
1037/Rockfort	Top Notch Kitchens &	David Jones	£12,234.58			
	2DLPWVR6:2-drawer Linen Press Mirrored Standard Wardrobe 600			23/05/2017		
CJ1189	Top Notch Kitchens &	Christine Jones	£4,387.11			
	LUE50L:Larder Euro 500mm L/H			23/05/2017		23/05/2017
	tiling grout to be redone			23/05/2017	25/05/2017	
1204/REV01	Top Notch Kitchens &	Peter Marshall	£6,502.79			
	Remedial issue			22/05/2017		
1259/REV01	Top Notch Kitchens &	Christine Jones	£3,920.52			
	1:BU103F:Base Unit F/HT 1000/3/870			14/08/2024		
			£33,422.90			

How does the Not Completed Remedials Report work?

The report lists:

- Products ordered via Remedials and
- Products/ snagging fixes to do that are entered in the **Aftersale** tab (see below).

AND

- where **Completed** in the Aftersale tab is blank



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

As each remedial is being processed by your company enter in the details of its progress in the **Aftersale** section: the Created, Ordered On, Delivery Required, Goods In, Delivered and Completed dates.

Once the item has been installed the fitter can enter the date in the Completed field of the **Aftersale** section.

If any of these dates are missing the items will appear in the **Not_Completed_Remedials** report.

Pipeline Report

The report can help with sales planning, by providing estimated sales on jobs quoted within a date range you specify. It groups potential sales between two dates you specify.

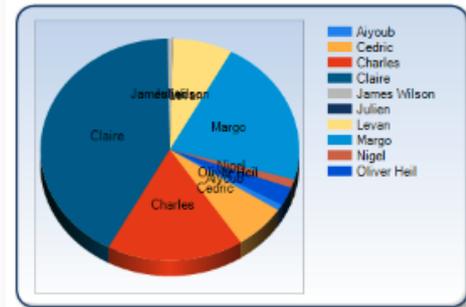
The report draws on data entered in the **Estimated Sold Date** field in the **Job Profile** tab along the bottom tabs in the main **Projects** view. The report also provides a graphical view of the information.

Pipeline Report

Estimated Sales Date
From: 16/08/2004
To: 31/12/2024

Designer	Estimated Sales Date	
Alyoub	2023/05	547.37
	2023/06	0.00
	Total	547.37
Cedric	2023/01	0.00
	2023/03	0.00
	2023/04	4,159.82
	Total	4,159.82

Pipeline Report



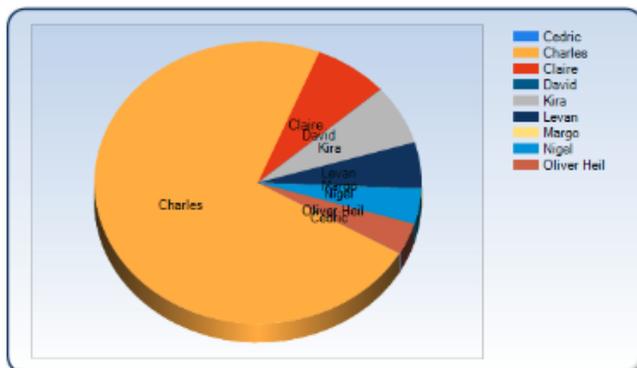
Profit Report

This report displays profit made on all the jobs set to a status of **SOLD**, by each salesperson, between the dates specified when creating the report.

The report also displays the cost and sell price of each job, the profit and the VAT. The report summarises this information by salesperson in table and graphical format.

Profit Report

Salesman	Client	Est. Cost	Sale Price Net	Est. Profit	Vat
Cedric	MARTIN	0.00	0.00	0.00	0.00
	Total	0.00	0.00	0.00	0.00
	-- New Client 2	3,419.40	4,915.17	1,495.77	638.97
	-- Test Client 2	243.21	243.21	0.00	31.62
	2323	282.53	315.53	33.00	63.11
	344werwer	626.89	873.86	246.97	113.60
	AA German Mankana	115.49	196.84	81.35	25.59
	AAA New German	689.60	1,089.50	399.90	217.90
	Alexon	234.98	455.42	220.44	59.20
	Anna Karenina	948.84	984.28	35.44	127.96



NOTE: This report, like all others, is dependent on the data you enter and will only be correct if the data you enter is accurate

Sales Invoices Raised Report

This report provides a summary of all invoices raised and the amounts invoiced. The report gives details of the job reference, client name, invoice number, date the invoice was created and the Nett, VAT and gross amount for the invoice between two dates you specify when running the report.

Sales Invoices Raised

01/01/2004-31/12/2024

Reference	Client Name	Invoice No	Invoice Date	Nett	Vat	Gross
1156	AAA New	1	04/12/2018	£1,089.50	£217.89	£1,307.39
1098	Jones & Co.	2	12/12/2018	£5,057.48	£1,011.49	£6,068.97
REF-001	Leonardo da	123	12/12/2018	£30.00	£15.00	£45.00
REF-001	Leonardo da	125	12/12/2018	£51.00	£0.00	£0.00
1247	Test CK1	126	08/05/2019	£163.76	£32.75	£196.51
REF-001	Leonardo da	124	12/05/2019	£0.00	£41.00	£0.00
1123	Bradbury	127	17/05/2019	£0.00	£0.00	£0.00
1253A	RND	128	21/08/2019	£2,430.62	£315.98	£2,746.60
1290/REV01	Anna Karenina	129	12/03/2021	£984.28	£127.96	£1,112.24

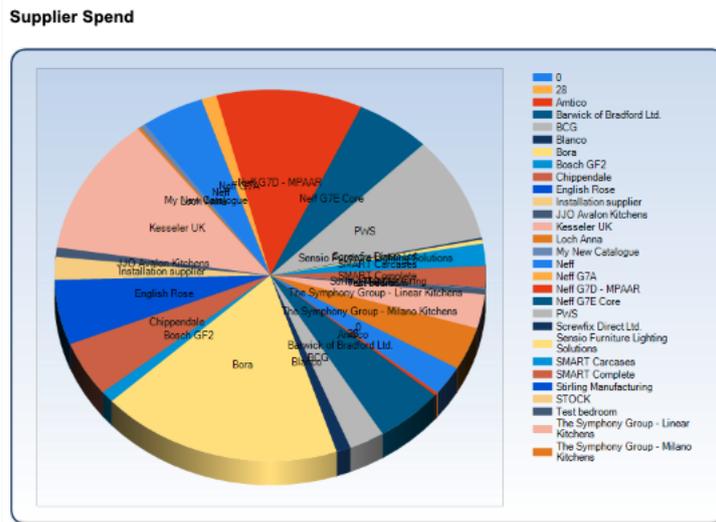
Supplier Spend Report

Generally, your suppliers will know more about how much you spend and on what than you will. The **Supplier_Spend** report will give you this information. The Report will provide an overview of how much you spend each month with each supplier. It provides you with the estimated cost price and what you plan to sell it for, along with the calculated profit you made on those items.

Supplier Spend

Supplier	Month Sold	Est_Cost	Sale Price Net	Est Profit
English Rose	2019/02	138.06	276.12	138.06
	2021/03	161.66	161.66	0.00
	2021/04	348.24	580.41	232.17
	2021/06	102.42	170.70	68.28
	2022/04	1,590.77	3,181.54	1,590.77
	Total	2,341.15	4,370.43	2,029.28
Installation supplier	2014/02	600.00	1,050.00	450.00
	2022/04	95.95	95.95	0.00
	2022/11	383.80	383.80	0.00
	Total	1,079.75	1,529.75	450.00
JJO Avalon Kitchens	2022/10	314.17	628.34	314.17
	Total	314.17	628.34	314.17
Kesseler UK	2016/11	4,664.00	9,328.00	4,664.00
	Total	4,664.00	9,328.00	4,664.00
Loch Anna	2018/12	100.00	171.72	71.72
	Total	100.00	171.72	71.72

The report also provides a graphical interpretation of the data, as shown below:



NOTE: This report, like all others, is dependent on the data you enter and will only be correct if the data you enter is accurate

Who Owes Me Money Report

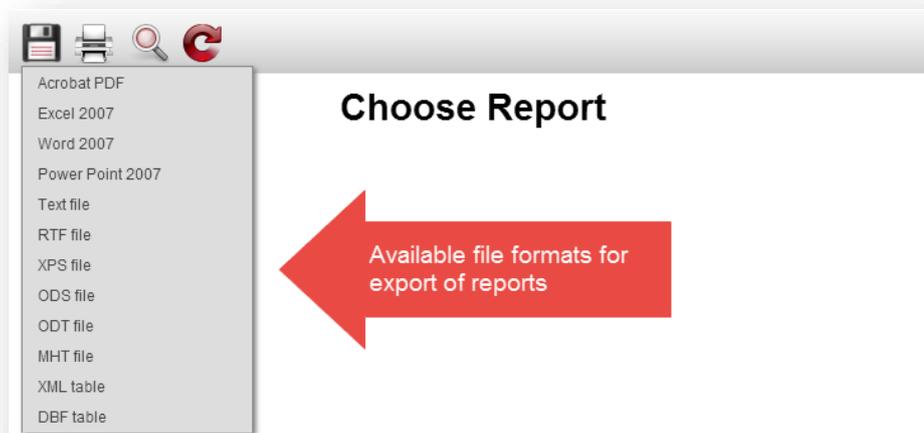
This report is useful for monitoring debtors. This report displays client names, the Job Reference number, the total quoted Job Price, including discount and the sum of money that has actually been invoiced. This could differ from the job cost if say only the deposit has been invoiced for the job.

Who Owes Me Money

Reference	Client Name	Salesman	Price	Money Owe	Invoiced Money
1478/P1	Customer 2	Charles	£31,920.85	£31,920.85	£0.00
1032	Jones	Charles	£11,533.73	£11,533.73	£0.00
1049	Bradbury Developments	Claire	£4,883.54	£4,883.54	£0.00
StockList	Bradbury Developments Ltd	Kira	£4,118.36	£4,118.36	£0.00
1027	Roberts Brothers Builders	Nigel	£3,197.90	£3,197.90	£0.00
IIIIII25891	Young	Nigel	£3,185.06	£2,685.06	£0.00
1335	-- New Client 2	Charles	£2,501.38	£2,501.38	£2,501.38
1142	New Client	Levan	£2,196.18	£2,196.18	£0.00
1243	Jacky Lin	Oliver Heil	£2,064.00	£2,064.00	£0.00
1395	--Test Client 3	Charles	£1,989.60	£1,989.60	£0.00
1394	Charles	Charles	£1,629.62	£1,629.62	£454.08
1233	-- New Client 2	Levan	£1,378.06	£1,378.06	£0.00
1341	-- New Client 2	Charles	£2,366.46	£1,366.46	£2,366.46

Saving your Reports

Most reports can be saved in a variety of different file formats so that this information can be analysed or presented in many different styles, as shown below.



Report Design Service

If there is a report you'd like in KBBConnect, please contact us. We add a new report on a monthly basis based on customer requests, so please do send your wish list to us.

Alternatively, should you require a specific report, we are able to provide a costed service to supply you with bespoke reports.

Our Report Design Service team are dedicated to designing reports specifically for you and will provide a fixed price quote for the report. They will work closely with you to make sure the report we produce is exactly what you require and will keep you informed at each stage of the design process.

If you would like to talk to us about this service, please call us or e-mail: clientcare@smart-systems.co.uk

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: info@smart-systems.co.uk

or

Telephone Number: +44 (0) 1923 919 278

