Quote Cover Letter Manual
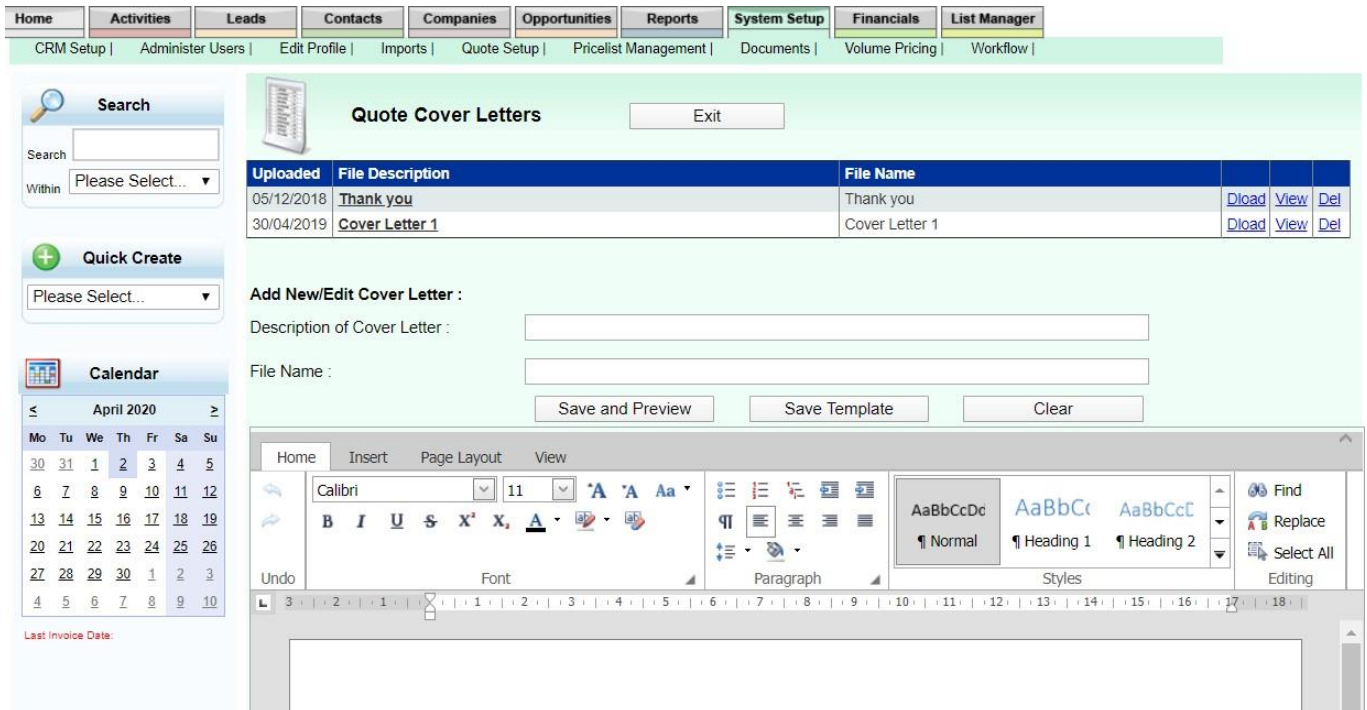

For support please contact: 011 462 6871 or support@bluwave.co.za.

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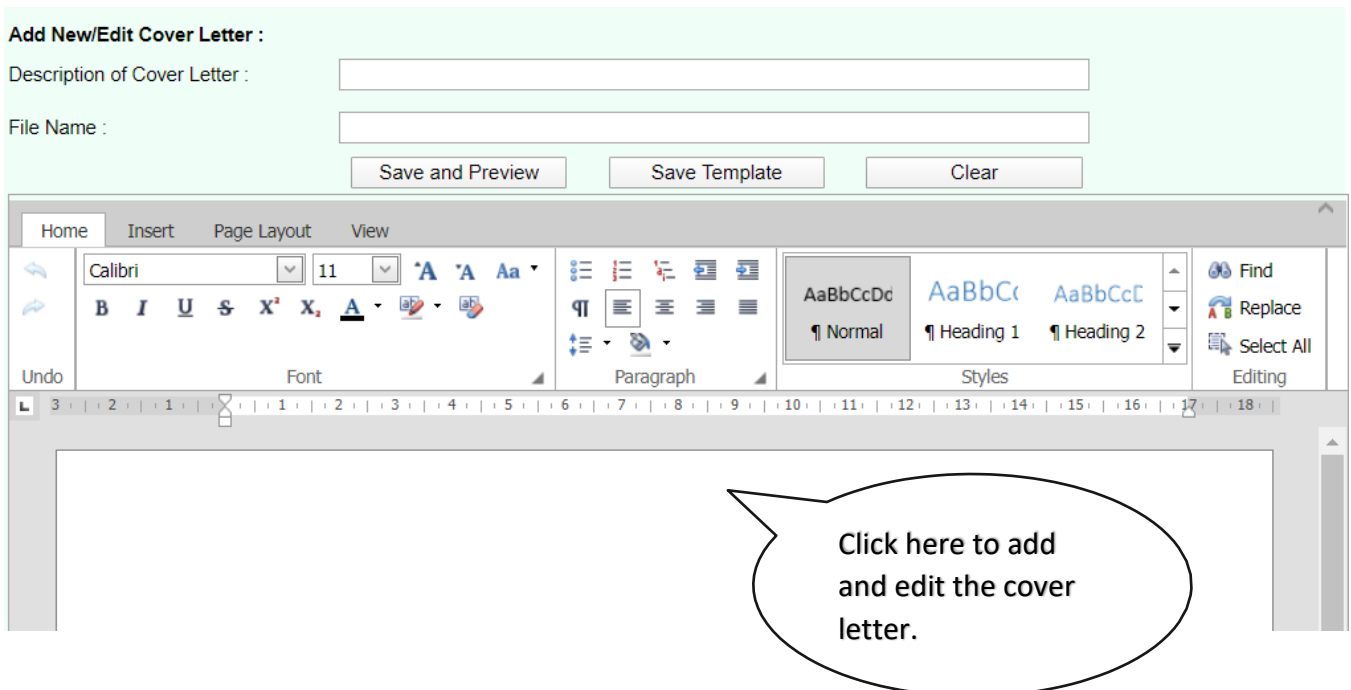
1. Adding a new cover letter to the system

Click on the System Setup tab, and in the dropdown choose the Quote Cover Letters option.

Once you have added letters, a list of the cover letters shows at the top of the page.

To add a new cover letter:
Start with typing in a description of the cover letter and a file name.

Click here to add and edit the cover letter.

Text can either be typed or pasted from a word document.
(Please note that with pasting the pictures and images, they will be left behind- they would need to be inserted individually)

Use the Home Ribbon option if there are changes necessary to the text.
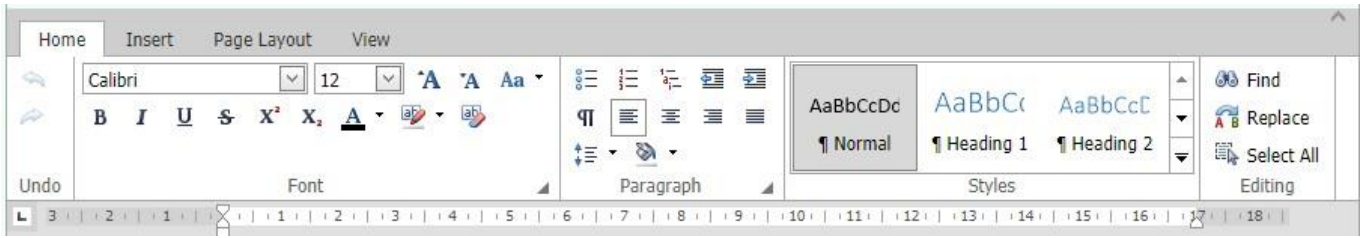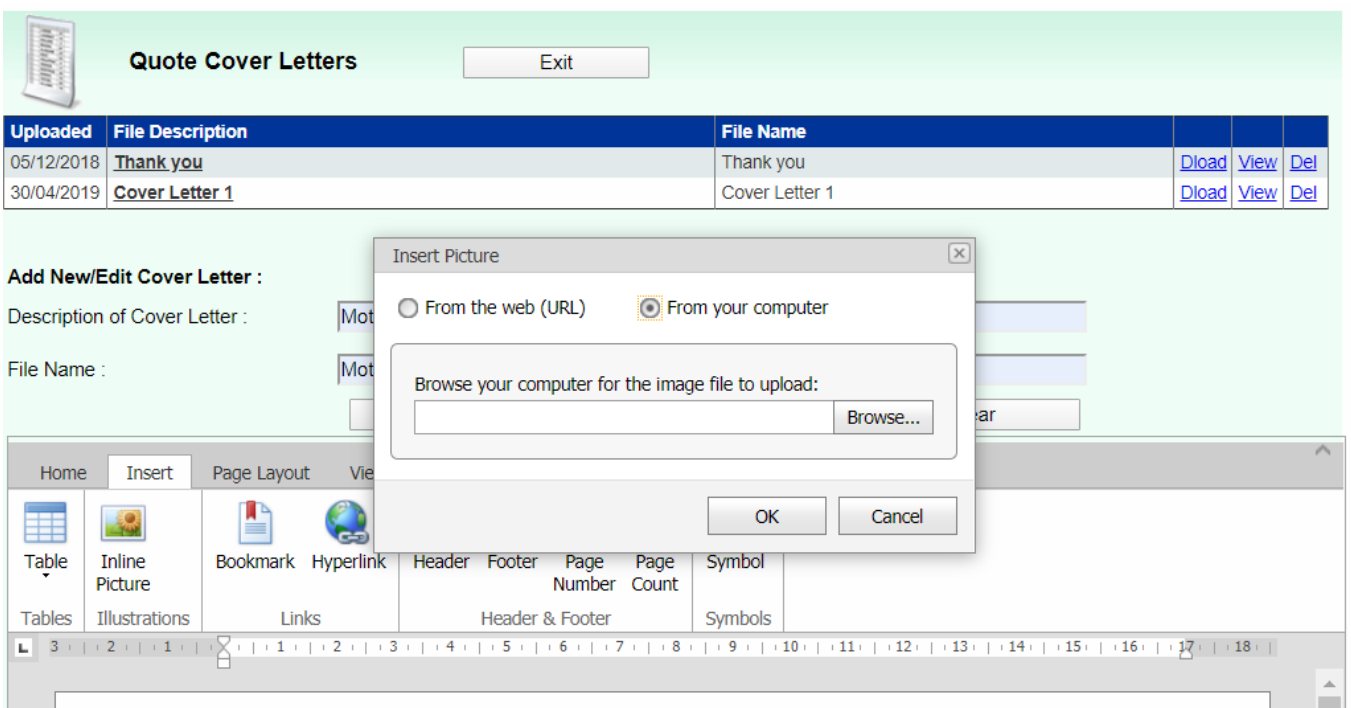

Here the user would be able to change the font type, size and style of the text.

To insert a picture, click on the Inline Picture icon.
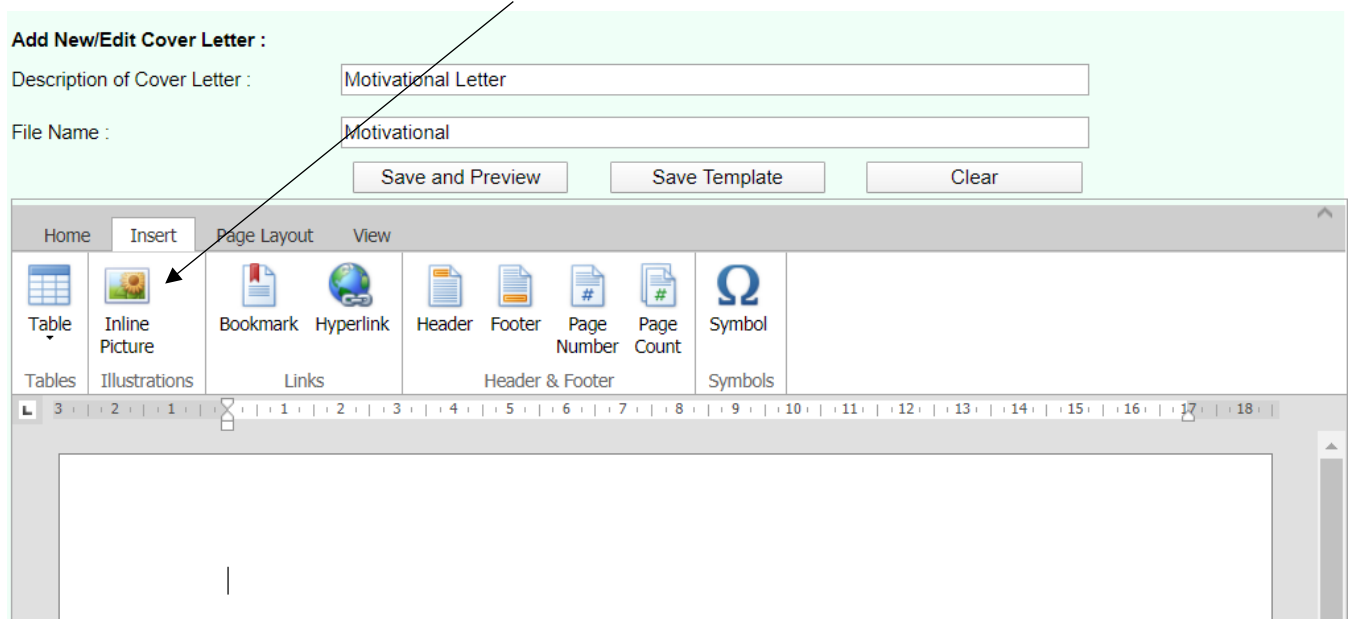
The **Insert Picture** dialogue box will pop up. You can then click on the **Browse…** button to select a picture from your computer and click on the **Ok** button when you have selected an image.

Add New/Edit Cover Letter :

Description of Cover Letter :   Printer Spec

File Name :   Printer Spec

Save and Preview   Save Template   Clear

Click on **Save Template** button to save the cover letter as an option to choose from when generating a quote.

After you have inserted the cover letter's images, text or tables, you can click on the **Save and Preview** button to view what the cover letter would look like inserted on the quote format that is set in the **Quote Setup**. Click in the **Exit Preview** button to return to the previous page.

Quotation

Quote No:	123456	Date:	1 January 2000
Acc No:	ABC12345	Valid for:	14 Days
To:	ABC Company Sample	Address:	Physical Address Details
Att:	John Sample		
Tel:	000 111 1234	From:	Salesperson Sample
Fax:	000 111 4321	Tel:	000 111 1234
Cell:	099 888 8888	Cell:	099 888 8888
Email:	john@abcsample.com	Email:	salesperson@sampleco.com

Dear   **John Sample**

Re: **New Company Project**

We have pleasure in submitting our quotation as follows.

2. Editing an existing quote cover letter.

Click in the appropriate file description. The cover letter will then be displayed in the bottom editing section.

The existing cover letter can also be downloaded and viewed or deleted from the system.

Changes can then be made, and the cover letter can then be updated by clicking on the **Update Template** button.

3. Adding in a Cover letter to a quote.

On Step 3 of the quote process. Click in the Edit Cover Letter button.

From the Quote Cover Letter page, the user would either be able to add in a completely new cover letter by starting to type or paste, or the user can select an existing cover letter from the dropdown field at the top of the screen.

Changes can then be made to the cover letter that would only be saved toward this specific quote.

Click on the **Update** button when done adding and changing as necessary.

Click on the **Update** button to save the cover letter with all its changes to onto the quote.

Choose from the Existing Cover Letters in this Dropdown.

Quote Cover Letter   Update   Cancel

Company : **Training Tarryn**   Quote No : **2154**

Select Default Cover Letter (If Required) [▼]   Preview

Home   Insert   Page Layout   View

Calibri   11   A A Aa ▾

B I U S X² X₂ A ▾ ▾ ▾

Undo   Font

AaBbCcDc   AaBbC(
¶ Normal   ¶ Heading 1

Paragraph   Styles

3 · 2 · 1 · ⌷ · 1 · 2 · 3 · 4 · 5 · 6 · 7 · 8 · 9 · 10 · 11 · 12 · 13 · 14

This is my cover letter - will have sales meetings with team more often ..
test output frmat

Click on this **Preview** button to see how the Quote Cover Letter will display when inserted onto the quote.

Once an existing cover letter is selected it would be displayed in the editing portion.

Order Form

Doc No:	**1148**		Date:	**02/04/2020**
Acc No:			Valid for:	**14 Days**
To:	**Green Leaf**		Address:	
Att:	**Bobby Roots**			
Tel:	**011 474 5664**		From:	**Michelle Snyders**
Fax:			Tel:	**011 462 6871**
Cell:			Cell:	**074 586 3506**
Email:	**bobby@greenleaf.co.za**		Email:	**mibpsnyders@gmail.com**

Dear   **Bobby**

Re: **Printers- 6- Office Use**

We thank you for the opportunity afforded us to quote you on the Lazer Business Equipment. (Quote Header Paragraph)

GENERAL SPECIFICATIONS
Model Numbers
MG7750 (BLACK)
MG7751 (WHITE)[13]
MG7752 (RED)[13]
MG7753 (GOLD)[13]

Functions
Wireless / Ethernet, Print, Copy, Scan, Cloud Link

02 April 2020