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## Quote Cover Letter Manual



For support please contact: 011 462 6871 or [support@bluwave.co.za](mailto:support@bluwave.co.za).

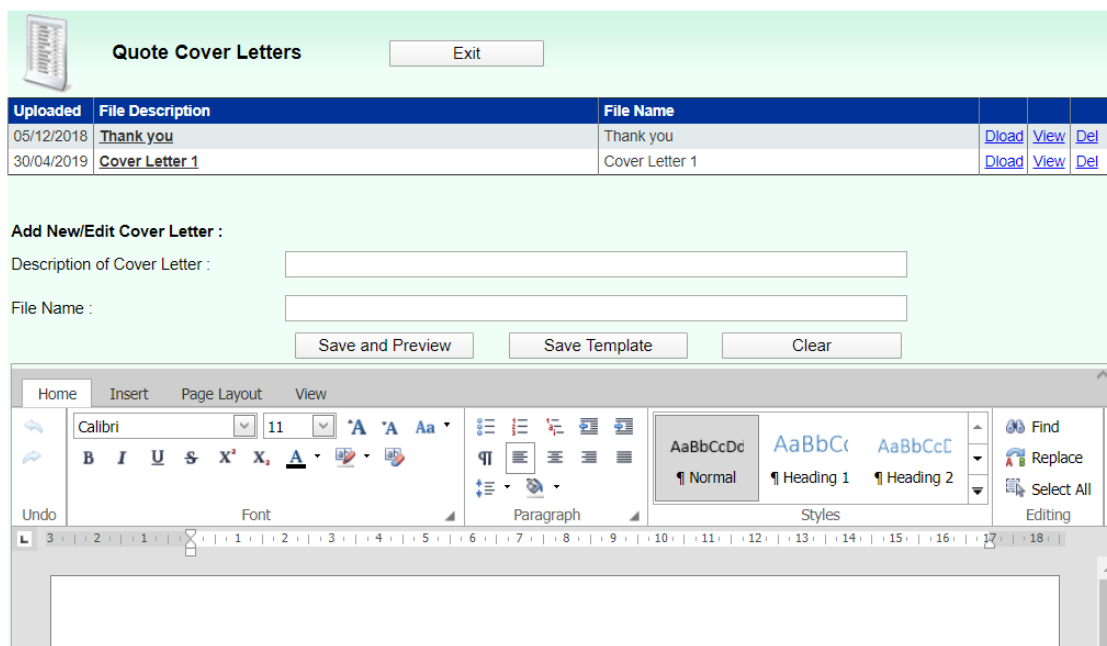
# Table of Content

- 1. Adding a new cover letter to the system .....4
- 2. Editing an existing quote cover letter. ....7
- 3. Adding in a Cover letter to a quote. ....8
- 4. Revision History .....11



# 1. Adding a new cover letter to the system

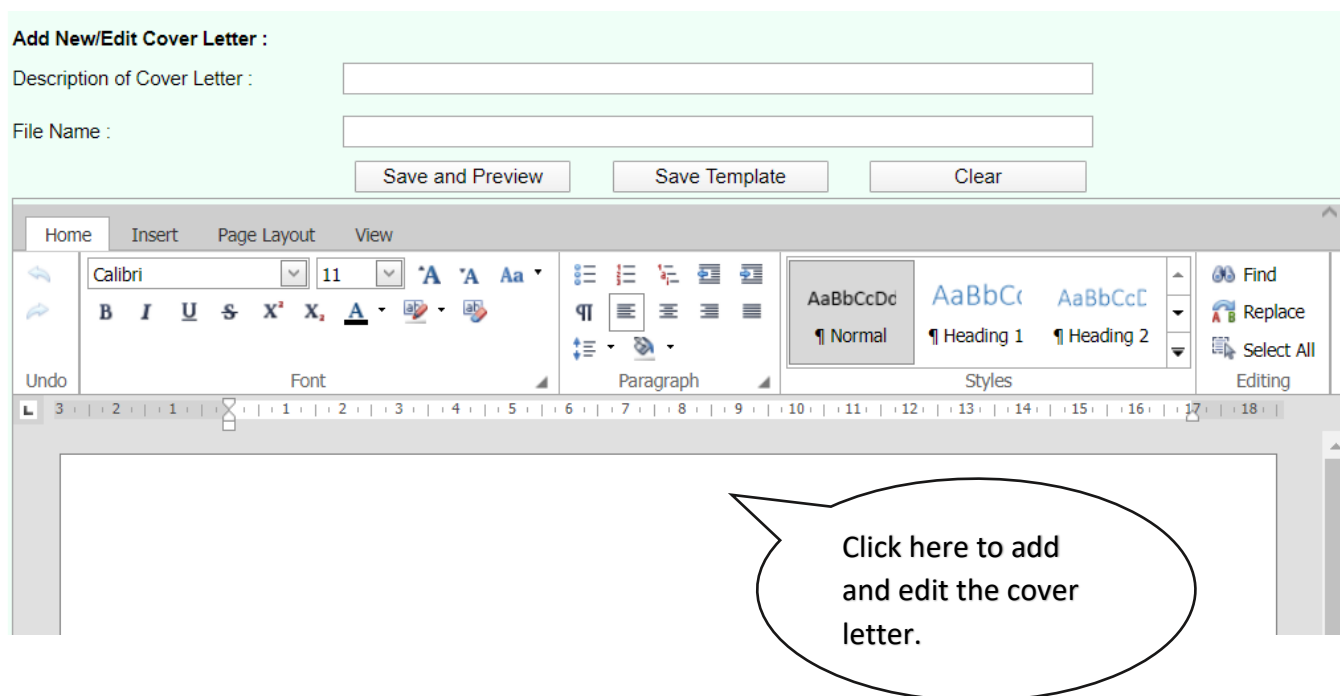
Click on the System Setup tab, and in the dropdown choose the Quote Cover Letters option.



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

To add a new cover letter:

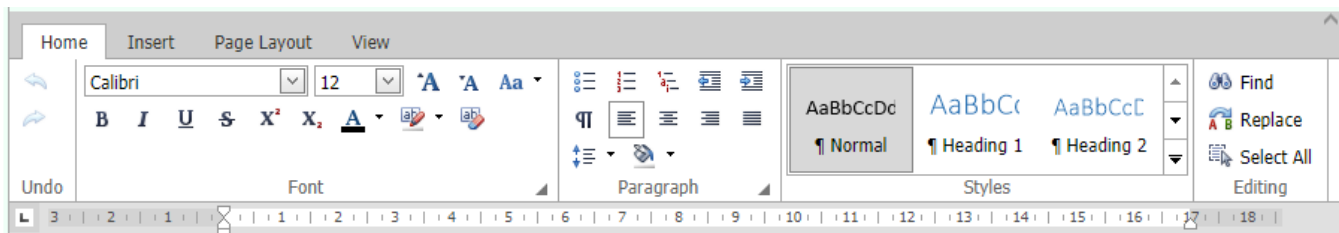
Start with typing in a description of the cover letter and a file name.



Text can either be typed or pasted from a word document.

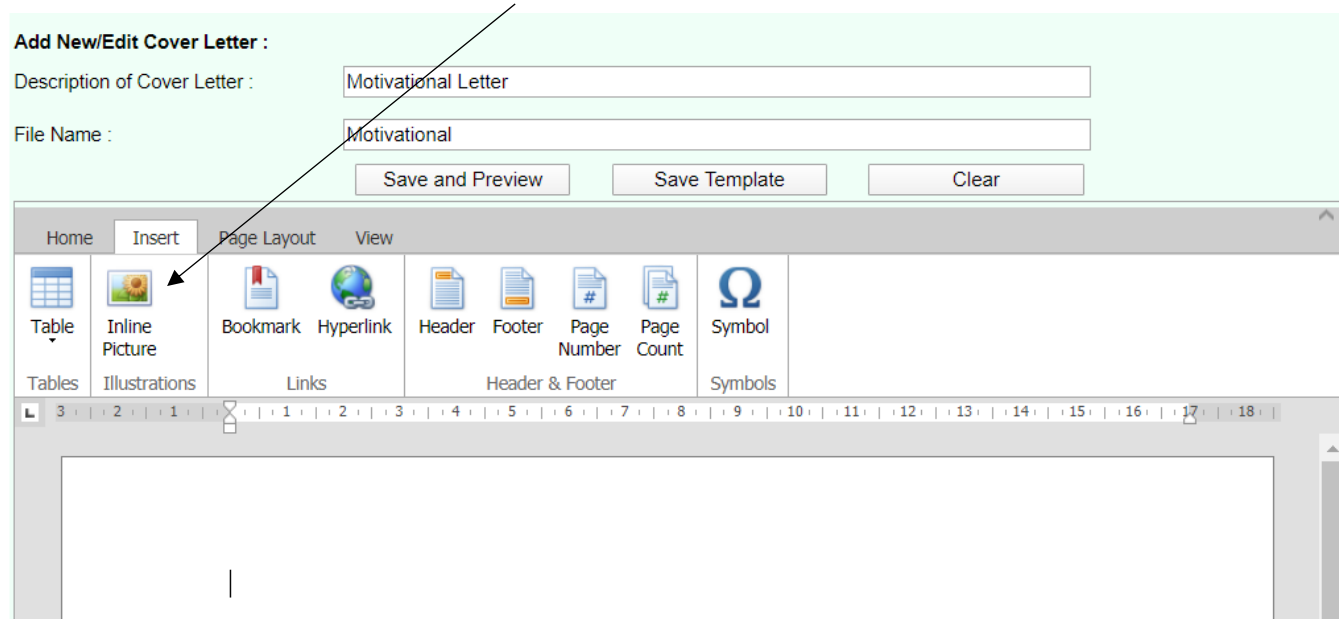
(Please note that with pasting the pictures and images, they will be left behind- they would need to be inserted individually)

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

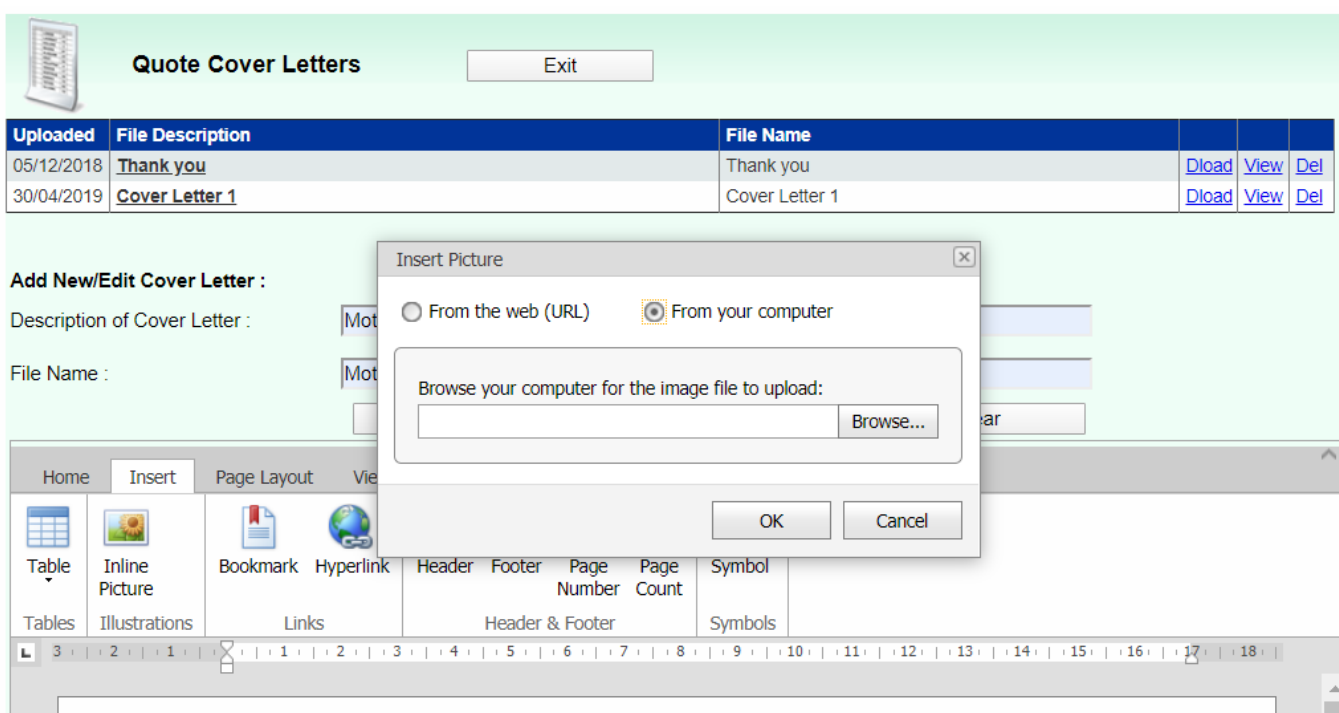


Here the user would be able to change the font type, size and style of the text.

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 :

File Name :

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.

Home | Activities | Leads | Contacts | Companies | Opportunities | Reports | **System Setup** | Financials | List Manager

CRM Setup | Administer Users | Edit Profile | Imports | Quote Setup | Pricelist Management | Documents | Volume Pricing | Workflow |

**Search**

Search

Within

**Quick Create**

**Calendar**

April 2020

Mo	Tu	We	Th	Fr	Sa	Su
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	1	2	3
4	5	6	7	8	9	10

Last Invoice Date:

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**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	From:	Salesperson Sample
Tel:	000 111 1234	Tel:	000 111 1234
Fax:	000 111 4321	Cell:	099 888 8888
Cell:	099 888 8888	Email:	salesperson@sampleco.com
Email:	john@abcsample.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.

The screenshot displays the 'Quote Cover Letters' management interface. At the top, there is a navigation menu with options like Home, Activities, Leads, Contacts, Companies, Opportunities, Reports, System Setup, Financials, and List Manager. Below this is a sub-menu with options like CRM Setup, Administer Users, Edit Profile, Imports, Quote Setup, Pricelist Management, Documents, Volume Pricing, and Workflow. The main area shows a table of cover letters with columns for Uploaded, File Description, File Name, and actions (Download, View, Delete). The 'Printer Spec' entry is selected. Below the table, there is a form to 'Add New/Edit Cover Letter' with fields for 'Description of Cover Letter' and 'File Name', both containing 'Printer Spec'. There are buttons for 'Save and Preview', 'Update Template', and 'Clear'. At the bottom, a Microsoft Word ribbon is visible, and a printer icon is shown in the center of the editing area.

Uploaded	File Description	File Name			
05/12/2018	<a href="#">Thank you</a>	Thank you	<a href="#">Dload</a>	<a href="#">View</a>	<a href="#">Del</a>
30/04/2019	<a href="#">Cover Letter 1</a>	Cover Letter 1	<a href="#">Dload</a>	<a href="#">View</a>	<a href="#">Del</a>
02/04/2020	<a href="#">Motivational Letter</a>	Motivational	<a href="#">Dload</a>	<a href="#">View</a>	<a href="#">Del</a>
02/04/2020	<a href="#">Printer Spec</a>	Printer Spec	<a href="#">Dload</a>	<a href="#">View</a>	<a href="#">Del</a>

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.

The screenshot shows the 'Quote Details - STEP 3' page. The 'Edit Cover Letter' button is located in the 'Quote Details' section, next to the 'Probability %' field. A red arrow points to this button from the text above. The form includes fields for 'Quoted By', 'Company', 'Contact', 'Quote Status', 'Quote Description', 'Exp Order Date', 'Probability %', 'Delivery', 'Payment Terms', 'Template', 'Approval Mgr.', 'Price List Retail', 'Doc Heading', 'Terms Set', 'App. Status', 'Quote No/Date', 'Valid For', 'Expires on', 'Follow up Activity', 'Follow up Date', 'Show Rebate?', 'Show Discount?', 'Combine Offer Totals?', 'Quote incl VAT?', 'Currency to Quote', 'ROE', and 'Approval Note'. There are also buttons for 'Back to Step 2 (Add Quote Items)', 'Terms', 'Select Offer', and 'Save and Preview Quote'. A table at the bottom has columns for 'Seq', 'Product', 'Description', 'Narrative', 'Qty', 'Price', 'Disc.%', 'GP%', 'Total', and 'Att'.

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.

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

The screenshot displays the 'Quote Cover Letter' software interface. At the top, there is a form with the title 'Quote Cover Letter' and an 'Update' button. Below the title, the 'Company' is set to 'Training Tarryn' and the 'Quote No.' is '2154'. A dropdown menu for 'Select Default Cover Letter (If Required)' is visible, with a 'Preview' button next to it. A 'Cancel' button is also present. Below the form, a Microsoft Word ribbon is shown with the 'Home' tab selected, displaying font and paragraph settings. The main editing area contains the text: 'This is my cover letter - will have sales meetings with team more often ... test output format'. Below the text is a preview image of a man and a woman in business attire sitting at a desk, looking at documents. A vertical scrollbar is on the right side of the editing area.

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	From:	Michelle Snyders
Tel:	011 474 5664	Tel:	011 462 6871
Fax:		Cell:	074 586 3506
Cell:		Email:	mibpsnyders@gmail.com
Email:	bobby@greenleaf.co.za		

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



### 4. Revision History

Version	Date	Updates
SM0023	11/10/2019	<ul style="list-style-type: none"><li>• Creation</li></ul>
SM0023.4	06/05/2024	<ul style="list-style-type: none"><li>• Update the screenshot for the new release</li></ul>

