



HELPSHEET: HOW TO ADD A WELCOME MESSAGE TO YOUR FERGUS QUOTES

Country: All

Purpose

In this help sheet we provide a step-by-step guide to adding your **welcome text** to your **Fergus Quote settings**.

Key Information

- Your quote document is often the first formal communication a potential customer will open.
- You can use the default description text fields to thank your customer for the opportunity to quote and to provide some key information about how the quote is set out, how to accept or even add any standard exclusions for your jobs.

ADDING CUSTOM WELCOME TEXT TO QUOTES

STEPS

- | | |
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| 1 | <p>> Open Fergus quote</p> <p>> Follow this video guide from Fergus (from 1:03 mins) to locate the custom <i>default description text</i></p> <p>> Replace the default text with your own welcome text.</p> <p>> It is up to you if you add some or all of this text.</p> <p>Pro Tip: We have recommended wording below which covers off the <i>most commonly missed</i> information that cause customers to query invoices or create delays to your trades works. This field in your quote is a great opportunity to inform your customers of</p> |
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Disclaimer: Tradie Terms does not control the Fergus platform and accepts no responsibility for any system bugs or issues that may affect the completion of this procedure. This procedure is based on Tradie Terms' knowledge of how to achieve the desired outcome to embed terms of trade and custom text and follows the Fergus published procedure guides where available.

Fergus issued procedures are also available at www.fergus.com.

key information.

2

Quoting Settings

Default Formatting Options

Default days until quote expiry:

Default Font Size:

Section formatting options

Show line item quantities Show line item prices Show line item totals Show section

Quote Orientation

Landscape Portrait

DELETE AND REPLACE WITH TRADIE TERMS
RECOMMENDED TEXT

Default Description Text

Our mission is to make every customer a repeat customer. As part of our service all quoted work comes with a 12 month workmanship guarantee. Customer service is everything to us and we have the systems in place so that we deliver on our promises.

3

>Create your sample text: ideas below.

>You can copy & paste into an open word/google doc and then adjust to your needs.

Thank you for the opportunity to provide this Quote/Estimate for your project.

PRICING | This Quote/Estimate has been prepared based on our discussions, any assessments made during any scoping visits plus your requirements such as plans or specifications supplied to us.

FIXED PRICE | **If this is a fixed price quote** our pricing includes all labour together with all standard and custom materials. Any changes to your materials selections, the scope or other variations as stated in our standard terms of trade attached will incur additional fees and may increase the quoted price.

COST ESTIMATE | **If this is a Cost Estimate** the price below is our best estimate of the labour and materials (standard or custom) required to perform the services. Your invoice will reflect the actual hours and materials to complete the scope of services and may be higher than this estimate. The price stated is not a fixed price.

CUSTOM MATERIALS | **If your project requires custom materials to be ordered** we have detailed your selections that apply to your project together in the description below. Please check that these are what you have selected as variations to pricing



	<p>may apply if you change your mind later.</p> <p>STANDARD EXCLUSIONS Please note that the following exclusions apply to this project in addition to our standard terms of trade:</p> <ol style="list-style-type: none">1. Customer Supplied Fittings: These are not guaranteed by us. If they are unsuitable for your project, additional costs will apply to source suitable alternatives.2. List any more that you want to add. <p>CUSTOMER WORKS: Please refer to the “Customer Obligations” section of our Terms of Trade (attached with this quotation) for required pre-site works and clearance activities to be performed by you. Please note that these must be arranged by you at your own expense prior to us commencing our Services. It will help to avoid delays to your project and any additional costs if these are arranged in advance.</p> <p>EARLIER QUOTES ARE REPLACED Please note that the pricing and scope outlined below will replace any earlier version we have issued.</p> <p>Thank you again for this opportunity. If you need to discuss any element of this proposal, please do not hesitate to contact us.</p> <p>We are looking forward to helping you with your project.</p> <p>[Your company name]</p>
4	<p>Paste your Custom Text to the <i>Default Description Text</i> field in Quotes Important Note: this will appear in every quote/ estimate.</p> <p><i>Avoid any job specific wording or this will pull through into every quote/estimate.</i></p>

END OF HELPSHEET