

HOW TO USE PROPOSALS

Overview

The Würth Baer Supply website includes a Proposal tool to simplify producing custom proposals for your customers. If you don't have another proposal system or you need something to supplement yours, we have a solution built into our website for you. Plus, when you produce a proposal through our site, you create a proposal history and the proposal itself only has your business branding on it and no reference to Würth Baer Supply keeping our involvement behind the scenes.

In its most basic form, the Proposal tool allows you to build a custom proposal for your customers for a project or job. You accomplish this by adding products from our site to an electronic proposal document. Next, you set extended prices (the price you want your customer to pay for the items) for the proposal. Finally, you print the proposal from you to your customer. The finished proposal only shows the customer your extended prices. Your proposal is saved for reprinting or for placing an order from later.

Submit Your Logo

Our Proposal tool allows you to customize the proposals you provide your customers with a logo of your choosing. If you do not provide a logo, the proposal will print with your company name at the top. Upload your logo through the logo submission form on the Proposal tool page and within 24 hours, you will be printing proposals with your logo on them. Our system accepts logo submissions in JPG, GIF, or PNG graphic formats.

To submit a logo, follow these directions:

1. Login to our website, <http://www.wurthbaersupply.com>
2. Click the **Proposals** link at the top center of the site in the charcoal gray bar.

The **Proposals** tool page appears.

Proposals

Create Proposals for your customers quickly and easily directly from our website. Customize the Proposal with your prices for the selected items and the customer only sees the Proposal prices you extend to them and not the prices you pay.

Getting started
There are three basic ways to get started:

- If you've already created one or more Proposals, select one from the list below to modify it and set prices. (The Proposal list is not visible until you create the first Proposal.)
- If you haven't created your first Proposal, you may do so in one of the following ways:
 - Find items in our online catalog and add them directly to a Proposal item-by-item.
 - Add all items for the Proposal to your Shopping cart and then convert your entire shopping cart to a Proposal.

[▶ Show instructions for use](#)
[▶ Click here to submit your logo for use on your Proposal \(JPG, GIF, PNG\) \[one-time only\]](#)

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Click to sort by Proposal #	Click to sort by Proposal Name	Click to sort by Customer	Click to sort by Date
6	test-proposal	All-Test	12/18/2012

3. Click the line [▶ Click here to submit your logo for use on your Proposal \(JPG, GIF, PNG\) \[one-time only\]](#) to open up the submission form.

[▶ Show instructions for use](#)
[▶ Click here to submit your logo for use on your Proposal \(JPG, GIF, PNG\) \[one-time only\]](#)

Fill in the blanks, attach a file, and press the Send button to send your logo. Your logo will be activated within 24 hours.

Account #:

Company:

Contact Name:

Email:

Contact Phone:

File
 No file chosen

[▶ Send request](#)

Most of your contact information is pre-loaded into the form from your website login.

4. Modify anything information on this for as needed.
5. Click the **Choose File** button and select the logo you want to submit.

- When the file is selected, click the **> Send request** button and your logo will be uploaded and forwarded for processing. It will be available for your use within 24 hours.

Create a Proposal

After your logo is submitted and processed into the Proposal tool, you are ready to create a proposal.


There are multiple places within our website to add items to a Proposal:

- Product Detail pages – select items and add them to a new or existing proposal.
- Shopping Cart – Copy your entire Shopping Cart to a proposal.
- My Purchases – Take items from your My Purchases and save them to a proposal.
- Order Status (Order History) – Select items from a past order and add them to a proposal.

Create a Proposal from a Product Details Page

- Find a product in our website and navigate all the way to the **Product Details** page.
- Click the checkbox next to one or more items on the page. For this example, we chose two items.

> Catalog > Hinges, Concealed > One Piece Face Frame Hinges



Grass America
108° One Piece Face Frame Hinges
For MDF Frame Material, 1/2" Overlay

Standard Features:

- The Grass TEC 861 MDF material face frame hinge has a patented wrap around base plate specifically designed for use with MDF face frame material - this design helps prevent material splitting
- Made in USA, all metal construction exceeds industry standards for weight and closing cycles
- Order hinge based on MDF frame thickness, three specific MDF thickness hinges are available: 1/2", 5/8" and 3/4"
- Available with doweled cup cabinet attachment only
- Use #8 x 3/4" pan head screw to mount to face frame and #6 x 5/8" flat head screws to attach hinge cup to door

Packing: Full box quantity of 250 hinges.
Sold In: Both broken and full box quantities. Discount available for full box orders.

[How can we improve this product description? Click here](#)

> Add to cart **> Add to list** **> Add to proposal** **> Pricing & availability**

Select Item(s)	Qty Req.	UM	Catalog Section & Page	Min. Order Qty	Item #	Degree of Opening	Overlay	Fixing Type	Boring Pattern	Closing Type	Mounting Type	Box Quantity	MDF Frame Thickness	MSDS (PI)
Wrap Around 861 for MDF Face Frames														
<input checked="" type="checkbox"/>	1	EA	B-5	1	GF30396-14 Mpn: 04742-14	108	1/2"	Dowel	42mm		Wrap	250 Each	1/2"	
<input checked="" type="checkbox"/>	1	EA	B-5	1	GF30397-14 Mpn: 04743-14	108	1/2"	Dowel	42mm		Wrap	250 Each	5/8"	

> Add to cart **> Add to list** **> Add to proposal** **> Pricing & availability**

Product Representation Disclaimer
Prices are subject to change without prior notice.

3. Click the 3rd button in the button bar, **> Add to proposal**, above or below the item list.

The **Confirm Items To Be Added to Proposal** screen appears.

Confirm Items To Be Added to Proposal

You have selected 1 item(s) to add to a proposal.

Select an existing proposal from the dropdown box or type a name to create a new proposal: **>** **Add to proposal**

4. To create a new proposal, type a unique name for the list into the field and click the **> Add to proposal** button at right.

A new proposal is created with that name and the items you selected are added to the proposal.

5. Or, if you want to add these items to an existing proposal, click the down arrow next to the field to open the dropdown list of available proposals.
6. Select an existing proposal from the dropdown.
7. Click the **> Add to proposal** button and the items are appended to the bottom of that proposal.

Create a Proposal from My Purchases

Creating a proposal from My Purchases works the same as the steps above, select items from the My Purchases page and click the **> Add to proposal** button. Then follow steps 4-7.

Create a Proposal from the Shopping Cart or Order Status





1. Add items to the Shopping Cart as you normally would.

- When you have added all items to the Shopping Cart, view the Cart.

Shopping Cart

To continue shopping, please use the Search field at the top of the screen or the left navigation menu.


[> Back](#) [> Empty cart](#)

Item	Item # Description	Pkg Qty	UM	Qty Order	Qty Avail.	Qty B/O	Job Name	Coupon Promo Code	Ships From	Unit Price	Ext Price
 Remove	FG506-6 TITEBOND I ORIGINAL GAL - 1 MSDS	1	EA	<input type="text" value="1"/>	1	0	<input type="text"/>	BP1798C	Vernon Hills,IL	\$14.9292	\$14.93
 Remove	AA53400 SLOTING CUTTER, 3 WING, 1/16" KERF	1	EA	<input type="text" value="1"/>	0	1	<input type="text"/>		Vernon Hills,IL	\$29.0250	\$29.03
 Remove	AA53402 SLOTING CUTTER, 3 WING, 5/64" KERF	1	EA	<input type="text" value="1"/>	0	1	<input type="text"/>		Vernon Hills,IL	\$29.3850	\$29.39
 Remove	AMBH26503-AS 18" TOWEL BAR, ANTIQUE SILVER FINISH	1	EA	<input type="text" value="1"/>	0	1	<input type="text"/>		Vernon Hills,IL	\$43.0716	\$43.07
Sub-Total:										\$116.42	

[> Save changes](#)

Job Name: *

PO #: *

Promo / Coupon Code: [> Apply](#) 

Only Ship Complete
(Order will be held until all merchandise is available)

Note: If you add items after applying multiple coupons, please apply those coupons again
Coupons applied: BP1798C, BP1628

Type a name to create a new Proposal for these items or add to an existing one: [> Save](#)

Add these items to an existing Shopping list or enter a name to create a new list: [> Save](#)

Note: Don't forget to enter your Promo code above.

[> Checkout](#)

- Scroll to the bottom of the Shopping cart to the field labeled: Type a name to create a new Proposal for these items or add to an existing one.
- Just as you did in the previous section, type a new name for the proposal into the field or click the down arrow to select a proposal from the dropdown list.
- Click the [> Save](#) button to create a new proposal with the Shopping cart items on it or to add the items to an existing proposal.

Create a Proposal from Order Status

- Click on the **Order Status** menu item to view your order history.
- Find a past order and click on the red order number link to view the **Order Detail** for the order.

3. Click the checkboxes next to 1 or more items on this past order.
4. Scroll to the bottom of the order to the field labeled: Type a name to create a new Proposal for these items or add to an existing one.
5. Just as you did in the previous section, type a new name for the proposal into the field or click the down arrow to select a proposal from the dropdown list.
6. Click the **> Save** button to create a new proposal with the order items on it or to add the items to an existing proposal.

Finishing the Proposal

After you've added items to a proposal, you are taken to the **Create Proposal** page where you enter the customer's information, update the quantities, and set pricing.

YOUR LOGO HERE
(if available...optional)

AFFORDABLE INTERIORS

Proposal # 6630	Customer Address:
Proposal Name: Steve Smith	Street: <input type="text"/>
Customer Name: <input type="text"/>	City: <input type="text"/>
Customer Phone: <input type="text"/>	State: Illinois ▼
Customer Email: <input type="text"/>	Zip: <input type="text"/>

Special Instructions:

Remove	Item	Item # Description	Pkg Qty	UM	Qty Order	Your Price	Your Ext. Price	Proposal Price	Ext Proposal Price
		DI8771 SILICONE PLUS SEALANT CLEAR	1	CT	<input type="text" value="1"/>	\$7.4370	7.44	<input type="text" value="0.00"/>	\$0.00
		KKCBEP 2 CHADWOOD BASE EP	1	EA	<input type="text" value="1"/>	\$16.8000	16.80	<input type="text" value="0.00"/>	\$0.00
		PM336E2S112550 SUNSET 1-1/8X5X10 G2S W336 - RO-L0309-5X10 (PO #: 131268)	1	SH	<input type="text" value="24"/>	\$62.5000	1500.00	<input type="text" value="0.00"/>	\$0.00
		PM645A2S112548 TRUE WHITE 1-1/8X4X8 G2S S645 - RO-L0310-4X8 (PO #: 131267)	1	SH	<input type="text" value="81"/>	\$36.3200	2941.92	<input type="text" value="0.00"/>	\$0.00
Your Sub-Total:							4466.16	Customer Sub-Total:	\$0.00

> Print proposal
> Email proposal
> Save proposal
> Add to cart
> Add blank line

The proposal is identified with a number at upper left for future reference.

7. Fill in your customer's information and any special instructions in the top section.

Set YOUR Proposal prices that you will extend to the customer for the items in the Proposal. (Würth Baer Supply prices are only visible to you in this view.)

Your Price = Your Würth Baer Supply price for an item

Your Ext. Price = Your Würth Baer Supply price times the quantity

Proposal Price = Your price per item set for your customer to see

Ext. Proposal Price = Extended Proposal Price is Proposal price times the quantity

Note: If you need extra line items for internal charges, labor, etc., you may add blank lines to the Proposal. These blank lines are editable for you to customize the proposal. Click the **> Add blank line** button to add a custom line.

The Proposal document automatically subtotals and totals for you.

8. When the proposal is all filled out and ready to your satisfaction, click the **> Save proposal** button to save the proposal.
9. Click the **> Print proposal** button to open the Customer version of the proposal in a new window. The proposal will be formatted to look like a proposal document coming from your company. There will be a small reference on the lower right corner of the proposal for you to use to reference back to the proposal. Otherwise, there are no Würth Baer Supply company references on the document.

Select **File > Print** from your browser window to print a physical copy of this document.

Convert a Proposal to an Order

After your customer has had a chance to review the proposal and accepts it, you can now go back to it and convert it into an order.

1. Log into the Würth Baer Supply Company website.
2. Click the **Proposals** link on the charcoal gray line.

The **Proposals** screen appears with your list of proposals.

Proposals



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61	Cabinet Anonymous		01/08/2014	
6630	Steve Smith		01/23/2017	

3. Click the red *Proposal #* or *Proposal Name* link to open an existing proposal.

The proposal editor screen appears.

4. Remove any items from the proposal by clicking the trash can icon, , next to any item.
5. If the proposal is acceptable and needs no other changes, click the [▶ Add to cart](#) button to add all items from the proposal to the Shopping Cart. Extra data from custom lines do not get copied.
6. Continue processing the order in your Shopping Cart.