

WATER^{ST.} BRASS

JAMESTOWN

DOOR HARDWARE QUOTING TOOL INTRODUCTION

WHAT IS IT?

- ◆ This web-based quoting tool will help you design and accurately price out your customer's door hardware using a point-and-click system through our website.
- ◆ Only list price is shown, so you can sit with a customer and guide them through these choices.
- ◆ You will choose hardware, just as you do in our binder, by function, style, type of lock and finish. You can even order accessories and add additional touches (such as knurling) using this system.
- ◆ Once you submit your selection, the tool will generate a quote and will automatically fill in our hardware schedule with list pricing, which you can download to share with a customer.
- ◆ Your final quote can also be sent to our customer service department to place an order. Remember to include your company's P.O. with your quote.

WHAT DO I NEED TO KNOW?

- ◆ The quoting tool can be used for any hardware that is shown in our catalog. Custom pieces, custom finishes (such as PVD), and special orders cannot be added through this tool and must be quoted directly with customer service.
- ◆ **Creating a hardware schedule in in this tool does not place an order.** This is strictly a quoting tool. This tool is for the showroom associate's ease of use and is no way connected with our ordering system.
- ◆ **This quoting tool is new, and prices are not guaranteed to be correct and will not be honored if there is a mistake with the programming.** Our customer service team will review each quote and confirm the pricing once the order has been placed. If there is a discrepancy with the price, you will be notified via email.
- ◆ It's a good idea to use this configurator along with the ordering guide in our binder for descriptions of each type of lock and function as well as larger images.
- ◆ There are a few categories outside of custom that may not be included in this quoting tool. For the below products, please order as a custom quote:
 - Surface Bolts
 - Dutch Door Bolts
 - Manual Edge Pulls
 - Roller Catches
 - Kick Plates
 - Mail Slot

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LET'S GET STARTED.

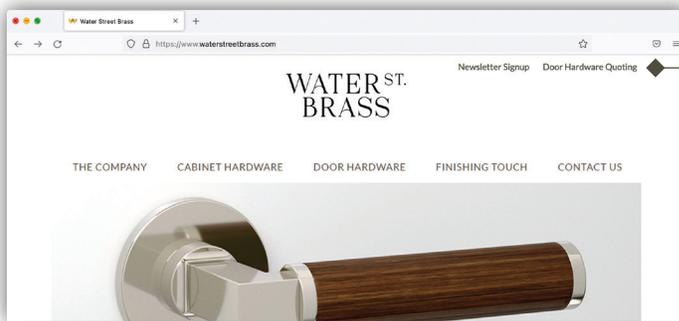
Each user can have their own user ID and password, or the company can choose to have one login for everyone to share.



1

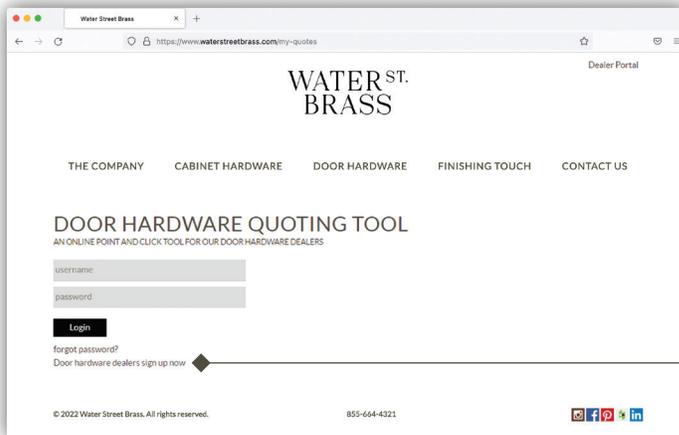
Go to our website.

www.waterstreetbrass.com



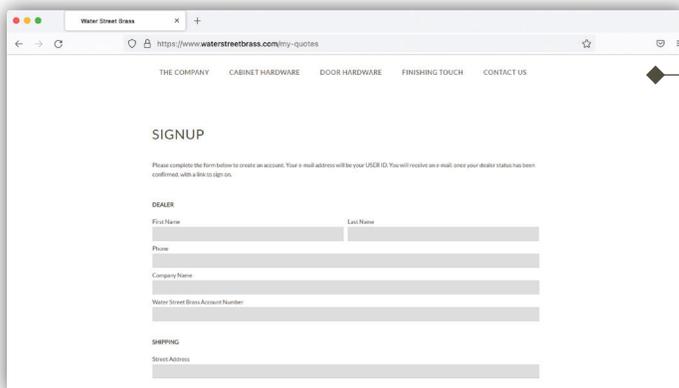
2

Click on the DOOR HARDWARE QUOTING button on the top right of the home page.



3

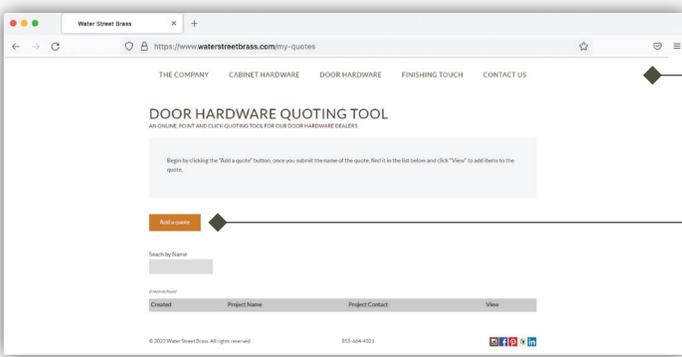
On the login screen, click on SIGN UP NOW.



4

Fill in the Signup Form. **Your email address will be your user name** (required), and you can choose your own password. The password must be a minimum of 6 characters and must include 1 uppercase letter and 1 number.

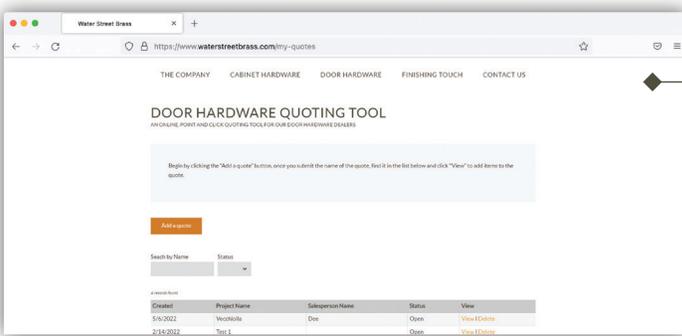
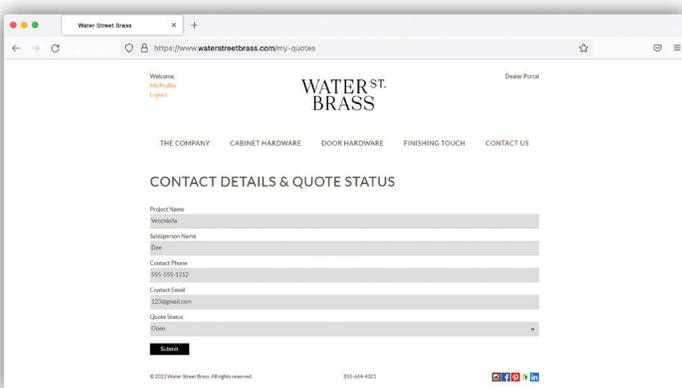
- 5 Once you click submit you will see a screen that says check your email.
- 6 The email will ask you to click a link to confirm your registration. **This link expires after 24 hours, and you will have to start again. Please check your SPAM folder if you don't receive this email right away.**
- 7 Once you click that link, the message will confirm your account has been activated.
 - a. You will see a message that says we are reviewing your account and that we will contact you once you have been approved.
 - b. You should receive an email confirmation within 1 business day that you are now approved and can log in.
 - c. While your account is being reviewed by our team, you will be able to log in and access your profile, but you will not be able to use the tool until your account has been approved.



8 After your account is approved you can login and get started creating a quote.

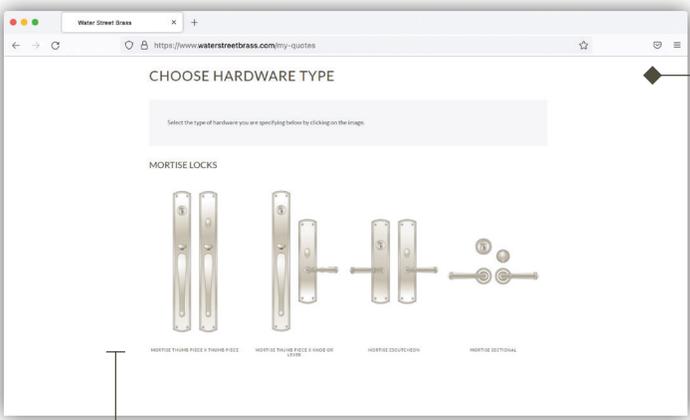
9 Click ADD A QUOTE and fill in the customer details.

- a. The Salesperson Name is optional, but we recommend you fill in this field if your company is sharing one login. This will show up in the list of open quotes, and you'll know who created it.
- b. The Quote Status should start as OPEN. See instructions on the last page for changing the quote status once the order is placed and/or closed.



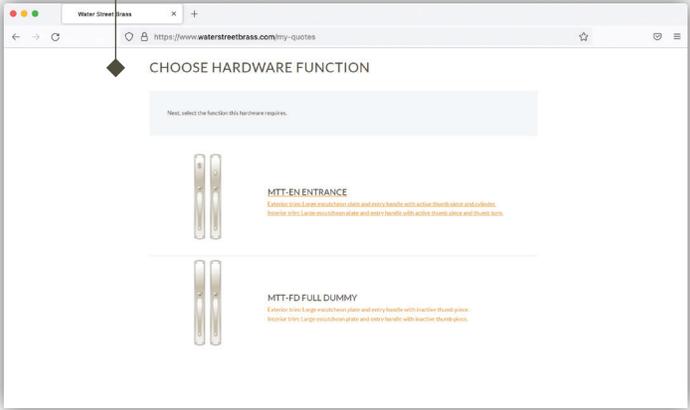
10 Once submitted, this new project will show up in the list of quotes.

- 11** Click VIEW to open the new quote and start adding items.
 a. Once you have multiple quotes created, click VIEW to go in and edit a quote at any time.

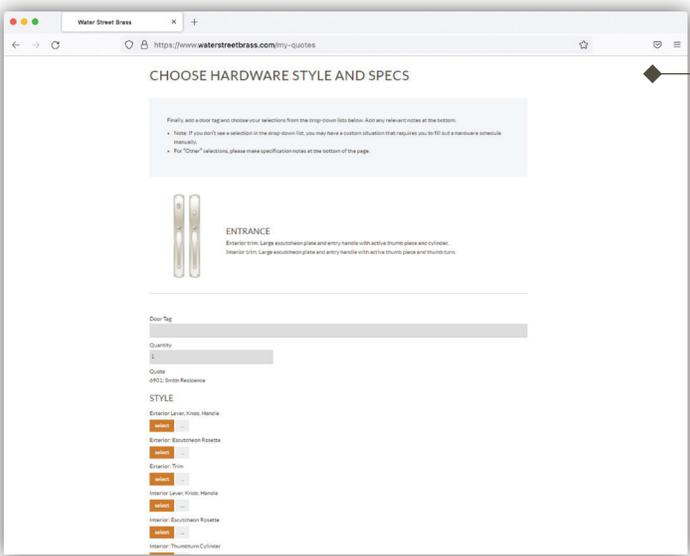


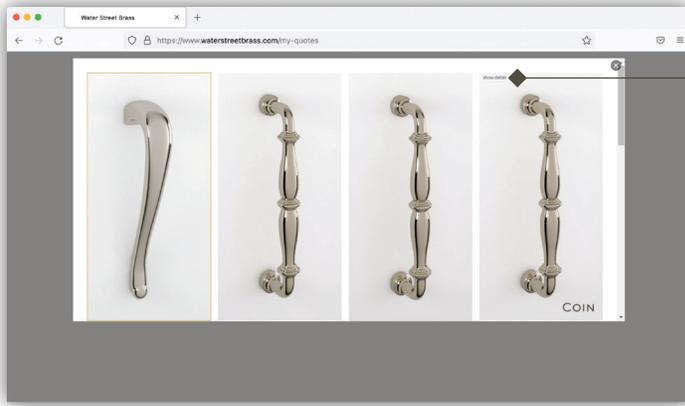
12 After you click VIEW and the new quote comes up, there are point and click instructions for how to proceed.

- Choose your options in this order:
1. Type of lock/product
 2. Function
 3. Finishes and Details



13 To choose the style, you will click on SELECT to see the images of each style available for that set. Scroll down to see all of the styles.

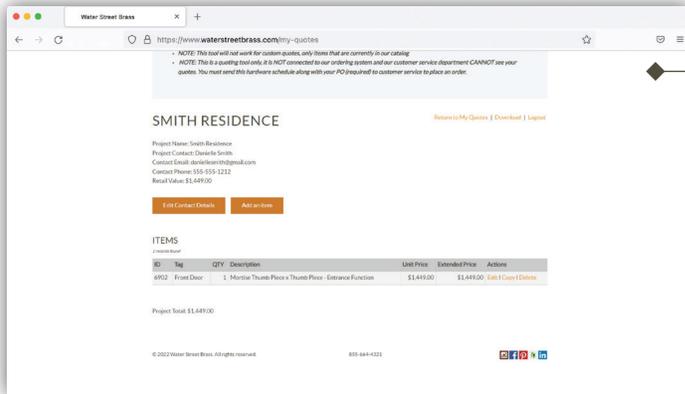




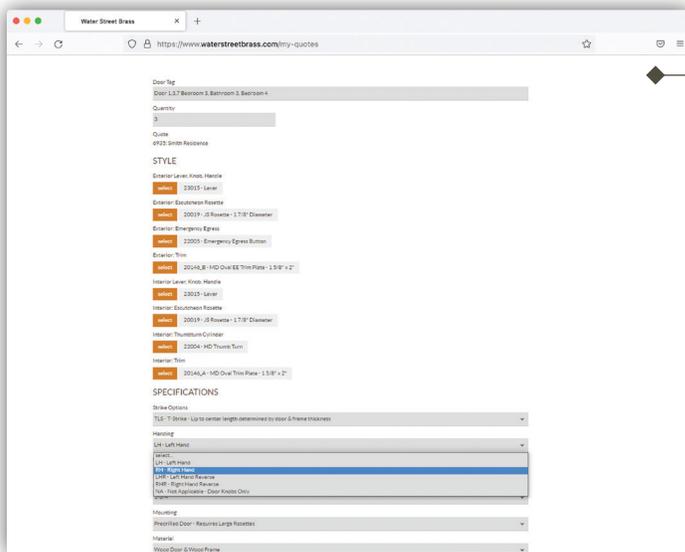
14 If you are choosing a knurled option, you can click on the SEE DETAIL note on the top left of the image box, and a close-up of that type of knurling will appear. Click it again to make it disappear.

15 Once you've chosen all of the specifics for that set and have entered any notes that are relevant, you can click SUBMIT.

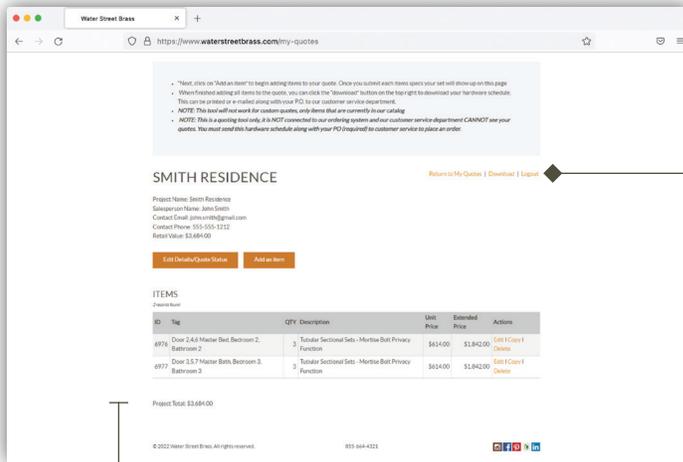
a. Important: If you choose OTHER in any drop-down box, you must make a note in the notes section with your selection.



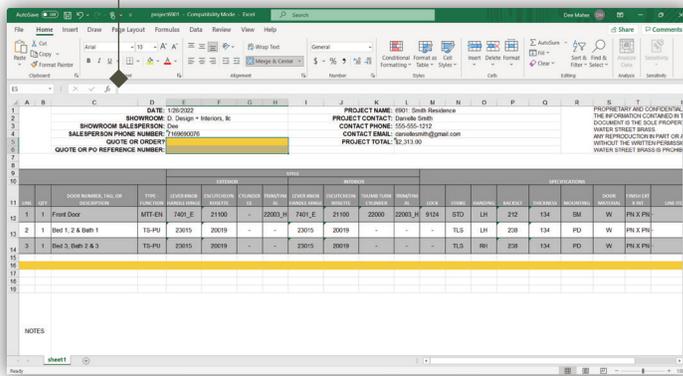
16 Once you click SUBMIT, you will be taken back to the main page for that project, where you can see the items you've entered and the list pricing.



17 You can keep adding items like this, one at a time. A bonus feature: if you have multiple sets that are identical but have different features, such as handing, for example, you can click COPY at the end of that line item, change the door tags and click submit again.



18 Once you've entered all of the items for that project, you will click the **DOWNLOAD** button on the top right. This will generate a copy of the hardware schedule with all the details. You will also have spaces at the top to fill in your company's P.O., as well as blank rows at the bottom of your project in the case you want to manually enter any custom or special order items for our customer service team to quote for you.



- 19** Your final hardware schedule/quote can also be sent to our customer service department to place an order. Remember to include your company's P.O. with your quote.
- 20** You can then **RETURN TO MY QUOTES** which will take you back to your main screen showing all of the quotes that you've created, or you can **LOGOUT**.
- 21 Order Status:**
 - a. If you'd like to use this to keep track of which orders are open, ordered and closed, you can click **VIEW** on any quote and click **EDIT CONTACT/QUOTE STATUS**. This allows you to change the quote status.
 - b. You can delete a quote by clicking **DELETE** on the main list of quotes, or you can delete a line item in a quote by clicking **DELETE** at the end of the line item within the quote.
- 22** Please email Andrea Desnerck, General Manager, with any troubleshooting questions. AndreaD@WaterStreetBrass.com
- 23** Please contact Lori Dean, our door hardware specialist, with any other door hardware questions. LoriD@WaterStreetBrass.com ♦ Phone: 716-296-3801