

BWG Quickbase Sales Rep Training

December 2, 2019

Goals of Training

- Standardize Best Practices
- Standardize Reporting
- Better Track from Job Quote to Order

Login: BWG Job Quote

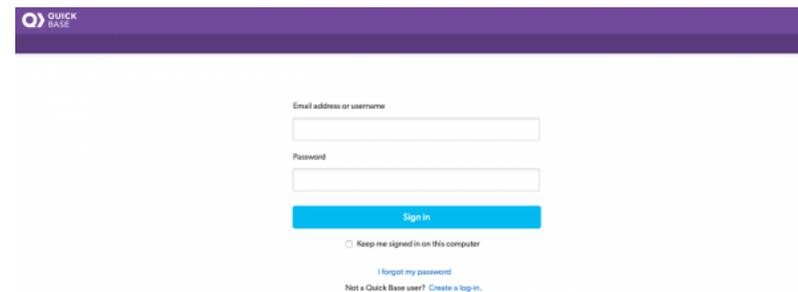
-To login

use: <https://bwg.quickbase.com/db/main?a=signin>

-To get to “BWG Job Quote” login and open the app.

For more information

see: <https://www.belknapwhite.com/quickbase-tutorial>



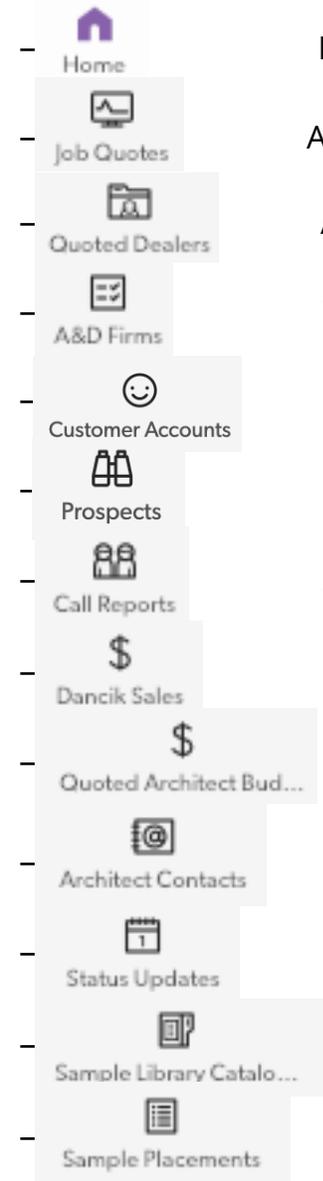
The screenshot shows the Quickbase login interface. At the top left is the Quickbase logo. Below it are two input fields: "Email address or username" and "Password". A blue "Sign In" button is positioned below the password field. Underneath the button is a checkbox labeled "Keep me signed in on this computer". At the bottom of the form, there are two links: "I forgot my password" and "Not a Quick Base user? Create a log-in."

BWG Job Quote Homepage

-Click “BWG Job Quote” to open the application.

-The homepage will display all possible filters.

-Sales Managers will have a slightly different Dashboard.



Home is the main button. Use this to get back to the job quote homepage. You can use any of the reports here including the “Executive Dashboard.”

A job quote defines an opportunity. Job Quotes will allow you to filter through all job quotes in the system and add a new job quote.

A dealer quote is the actual quote to our customer. Quoted Dealers will allow you to filter through all the dealer quotes associated to a job quote.

These are all architecture and design firms. A&D Firms will allow you to filter through all the firms in the system and add a new firm.

These are the customer accounts in Dancik. Customer Accounts will allow you to filter through all the accounts in the system.

These are the new prospects. When an account is new and not a true customer yet, you can add the prospect here to track calls.

A call report is a note for a specific account and/or contact. Call Reports will allow you to filter through all call reports in the system and add a new call

Dancik Sales will allow a user to see the total sales for a rep over a period of time. These are the total order sales associated to a job quote in the system.

Quoted architect budget prices are sent to architects and designers to give a rough idea of the price for the material. Quoted Architect Budget Prices

These are Architects and Designers only. Architect Contacts will allow you to filter through all contacts in the system and add a new contact.

Status Updates will allow you to filter through all status updates made in the system over a period of time.

Sample Library Catalogue Home allows you to filter through and add sample library entries. This allows you to record what samples are with a specific

This is used to record what samples are with each specific firm. Sample Placements allows you to filter through all items in the system and add a new

Any other icons not displayed here can be ignored. They are for administrative purposes only.

Look Up Firm



-To search for an Architecture and Design “A&D Firm” in our system select the icon.

-Use the “+New A&D Firm” button in the top right to add a new firm.

-Use the “State” filters, or search box to find a specific firm.

-Click on a specific firm to jump to the detail page or one of the underlined items to jump to recent job quotes attached to the firm, or contacts associated to the firm.

-You can edit the firm using the “Edit” button in the top right, add a “Call Report” to the firm, or add an “Architecture Contact” to the firm.

The Belknap White Group

My Apps | The Feedback App | Daily Sales | Marketing Tracker | Derek Job Quote Dashboard | IT Ticket Help Desk-Derek | BWG Job Quote | New App

Home | Users | Job Quotes | Quoted Dealers | A&D Firms | Flooring Contractors | Call Reports | Danck Sales | Price Classes | Instructions | Migr codes | Quoted Architect Bud... | Architect Contacts | Danck Extract of Bill T... | ACCT-CAT to Reps | Status Updates | Item Classes | Sample Library Catalo...

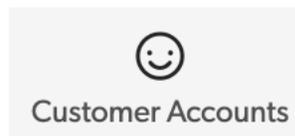
A&D Firms | A&D Firms Home | You've made changes | Save as report... | + New A&D Firm | Grid Edit | Email | More

STATE NY

Reporting Defaults 1-200 of 430 A&D Firms

Company Name	City	State	Zip	Specifier Rep	# of Job Quotes in last 2 years	Phone	Website	State is 'ny'	# of Architect Contacts
Mitchell Associates Architects	Voorheesville	NY	12186	Harry Lentz	2	(518) 765-4571			2
RIDA	Albany	NY	12203	Harry Lentz	0	(518) 713-4537			2
McKinney & McDonald	Latham	NY	12110	Harry Lentz	0	(518) 783-8933			0
QPK Design	Syracuse	NY	13201	Harry Lentz	1	(315) 472-7806			0
Hunt Arch	Horseheads	NY		Harry Lentz	2				1
Spire Architecture	Millbrook	NY	12545	Harry Lentz	0				0
Collier Architects	Latham	NY	12110	Harry Lentz	0	(518) 783-1663			2
EYP	Albany	NY	12203	Harry Lentz	2				1
D2D Green Interiors	E Greenbush	NY	12061	Harry Lentz	0	(518) 463-8068			1
Atmosph Design Group	Valhalla	NY		Harry Lentz	0				2
Schaflucas Architects	Amherst	NY	14228	Harry Lentz	0	(716) 636-5000			0
SRG Schenectady	schenectady	NY	12305	Harry Lentz	2	(518) 374-9412			2
Johnson-Schmidt Architect	Coming	NY	14830	Harry Lentz	0	(607) 377-4752			2
Rhinebeck Architecture	Rhinebeck	NY	12572	Harry Lentz	2	(845) 876-2832			2
C2 Design & Architecture	Schenectady	NY	12305	Harry Lentz	1	(518) 832-0825			2
DPS Engineering	Albany	NY	12110	Harry Lentz	1				1
NYC CDPC	Albany	NY	12208	Harry Lentz	0	(518) 783-1663 x5187831663			1
NYS Dasny	Albany	NY	12207	Harry Lentz	1	(518) 257-3096			2

Look Up Customer Account



-To search for a “Customer Account” in our system select the icon.

-Use the filters on the left, or search box to find a specific account.

-Click on a specific account to jump to the detail page or click one of the underlined Number of Dealer Quotes for Customer Account to jump to recent dealer quotes.

-You can add a “Call Report” to the account, or add a “Customer Account Contact” to the account.

The Belknap White Group

My Apps | Daily Sales | BWG Email Central | BWG Job Quote | New App

Home | Users | Job Quotes | Quoted Dealers | A&D Firms | **Customer Accounts** | Prospects | Call Reports | Dancik Sales | Price Classes | Instructions

Customer Accounts > Customer Accounts Home

Grid Edit | Email | More

FILTERS

- Branch
 - 1
 - 4
 - ALB
 - ALL
 - AVO
 - AWI
 - BIL
 - BUF
 - CCA
 - CPS
 - CRA
 - HFT
 - MCH
 - POM
 - RCH
 - RDC
 - WIL
 - (blank)
- State

Search these customer accounts

List All 1-200 of 6480 Customer Accounts

	Account Number	Account Name	# of Quoted Dealers for this Customer Account	City	State	Phone	Branch	Rep Name of AOT Rep	Rep of AR
	4710	CAPITAL CARPET & FLR.SPEC	<u>468</u>	WILMINGTON	MA	(781) 935-9430	BIL	CORY CUNNINGHAM	
	1250	ALLEGHENY FLOORING CORP. UNION	<u>434</u>	WINCHESTER	MA	(781) 935-1077	BIL	CORY CUNNINGHAM	
	4265	BUSINESS INTERIORS FLOOR COV.	<u>421</u>	WOBURN	MA	(781) 938-9994	BIL	CORY CUNNINGHAM	DAVID BORG
	23360	PAVILION FLOORS	<u>312</u>	WOBURN	MA	(781) 933-8500	BIL	CORY CUNNINGHAM	
	16520	J C FLOOR COVERING INC	<u>221</u>	BILLERICA	MA	(978) 988-9229	BIL	CORY CUNNINGHAM	
	14890	M. FRANK HIGGINS CO., INC.	<u>184</u>	NEWINGTON	CT	(860) 953-6826	4	BOB WAINMAN	AMY BRUEI
	27990	SPECTRUM FLOORS, INC.	<u>166</u>	CHESHIRE	CT	(203) 250-1500	4	ROANNE MARQUARDT	AMY BRUEI

Look Up Prospect



- Select Prospects in the top bar.
- Scroll down to view the Prospects.
- Use the column titles to filter the records by clicking on the title.

The Belknap White Group | Hi, Derek Morrocco

My Apps | Daily Sales | BWG Email Central | **BWG Job Quote** | New App

Home | Users | Job Quotes | Quoted Dealers | A&D Firms | Customer Accounts | **Prospects** | Call Reports | Dancik Sales

Prospects > **Prospects Home** | + New | Reports & Charts

4 Prospects | All

	Prospect Business Name	Record Owner	Date Created
<input type="checkbox"/>	Derek's Flooring	Derek Morrocco	11-11-2019 09:59 AM
<input type="checkbox"/>	Iona management	jeff swedelson	11-19-2019 08:19 PM
<input type="checkbox"/>	Skyline management	jeff swedelson	11-21-2019 09:05 PM
<input type="checkbox"/>	Test Prospect	Mark Shnier (YQC)	11-07-2019 06:56 PM

Add Prospect

-To add a new Prospect select the “+New Prospect” button in the top right corner.

-Add the business name, Main Contact, Main Contact Email, Phone, and Address.

-Select “Save and Close”

-You can add call reports to the Prospects by selecting “Add Call Report.”

-If the Prospect becomes a customer, let Steph Betro know, and she’ll move the Prospect information over to the Customer Accounts section.

-Customer Accounts are a reflection of Dancik and cannot be edited. Any new Prospects should be added to the Prospects Section, until the business becomes a customer.

The screenshot shows the 'Add Prospect' form within the Belknap White Group software. The interface includes a top navigation bar with 'The Belknap White Group' logo, user information 'Hi, Derek Morrocco', and various application icons like 'My Apps', 'Daily Sales', 'BWG Email Central', 'BWG Job Quote', and 'New App'. Below this is a secondary navigation bar with icons for 'Home', 'Users', 'Job Quotes', 'Quoted Dealers', 'A&D Firms', 'Customer Accounts', 'Prospects', 'Call Reports', and 'Dancik Sales'. The main form area is titled 'Prospects > Add Prospect' and contains several input fields: 'Prospect Business Name' (highlighted with a blue border), 'Main Contact', 'Main Contact email', 'Phone', and 'Address'. The 'Address' section includes a search bar 'Search for an address', three text boxes for 'Street 1', 'Street 2', and 'City', a dropdown menu for 'Select a State/Region...', and a 'Postal Code' field. At the bottom of the form, there is a section for 'Call Reports' with an 'Add Call Report' button.

Search Call Reports



-You may want to search through your "Call Reports" from time to time.

-You can select "Call Reports" at the top, use the filters to the left, or the search bar at the top, to find a specific "Call Report."

-Alternatively select an "A&D Firm", "Customer Account", or "Prospect" and browse the recent call reports for the individual item.

The Belknap White Group

My Apps | Daily Sales | BWG Email Central | BWG Job Quote | New App

Home | Users | Job Quotes | Quoted Dealers | A&D Firms | Customer Accounts | Prospects | **Call Reports** | Dancik Sales | Price Classes | Instructions | Mfgr codes | Quotec

Call Reports > Call Reports Home

+ New Call Report | Grid Edit | Email | More

FILTERS

- A&D / Dealer**
 - A&D
 - Dealer
 - Prospect
 - (blank)
- Yesterday df**
 - No
- Week df**
 - 1. This Week
 - 2. Last Week
 - 3. Prior Week
 - 4. Older
- Month df**
 - 1. This Month
 - 2. Last Month
 - 3. Prior Month
 - 4. Older
- Last Modified By**

Search these call reports

All Call Reports by Recent Date 1-500 of 17301 Call Reports

	Contact with	A&D / Dealer	Job Quote	Project Name & JQ#	Main Purpose of Call	Call Report Note
	ALLEGHENY FLOORING CORP. UNION	Dealer	9568		Quoted_a_Job	Allegheny got back to me, they would like to change the
	TEST	Dealer			Updated_Display Placed_Order Training_or_Product_Knowledge	This is a test
	FREIGHT LIQUIDATORS	Dealer			Updated_Display Training_or_Product_Knowledge Quoted_a_Job Left_Sample	Dropped off somerset traditional tote and went over pricing...issue with pricing the jobsite and spoke with hometown and brought sample what was delivered.
	MAHOPAC FLOOR COVERING CORP	Dealer			Training_or_Product_Knowledge	Looking for more wood displays went over briefly a few days sales meeting 12/4 and will follow up 12/6 and meet with finish job
	SAM'S CERAMIC & STONE (A)	Dealer			Training_or_Product_Knowledge Quoted_a_Job	Went over pricing on and checked stock on chesapeake li we have stock on most items and we can fill orders asap... checked stock on both...followed up with terry on open in check number...have to get essentials samples for rigid cc
	J ALPERIN INC (P)	Dealer			Quoted_a_Job	Followed up with bruce on parkchester sheet job and got for now getting hurt by the new laws ...left chesapeake es

Create Call Report

-A Call Report is a note attached to an “A&D Firm”, “Customer Account,” or “Prospect.”

-To create a “Call Report” go to “Call Reports” by selecting the icon and selecting “+New Call Report.” “Call Reports” should be assigned to a specific “A&D Firm,” “Customer Account” or “Prospect.”

-You can also create a “Call Report” by going to a specific firm, customer, or prospect and selecting “Add Call Report.” This will pre-populate some fields for you.

-Enter the A&D Firm, Customer Account, or Prospect.

-Select the Main Purposes of the call from the multiselect drop down.

-Enter the Call Report Entry notes if needed.

-Leave the date as the default.

-Enter a follow up date and set the reminder check box, if you’d like an email reminder.

-Click “Save & Close”.

The screenshot shows the 'Add Call Report' form in the 'Call Reports' section of the software. The interface includes a top navigation bar with 'The Belknap White Group' logo and user information 'Hi, Derek Morrocco'. Below the navigation bar are tabs for 'My Apps', 'Daily Sales', 'BWG Email Central', 'BWG Job Quote', and 'New App'. The main navigation area contains icons for 'Home', 'Users', 'Job Quotes', 'Quoted Dealers', 'A&D Firms', 'Customer Accounts', 'Prospects', 'Call Reports', and 'Dancik Sales'. The 'Call Reports' tab is active, showing the 'Add Call Report' form. The form has a breadcrumb 'Call Reports > Add Call Report' and a 'Save & close' button. The form fields include:

- 'A&D Firm - Company Name*' with a search and select dropdown.
- 'Customer Account Name*' with a search and select dropdown.
- 'Prospect Business Name*' with a search and select dropdown.
- 'Call Report Entry' with a large text area.
- 'Call Report Note' with a text field containing 'Job Quote - PROJECT NAME'.
- 'JQ Hyperlink' with a text field.
- 'Date *' with a date picker set to '11-30-2019'.
- 'Follow up Date' with a date picker set to 'mm-dd-yyyy'.
- 'Remind me?' checkbox, which is checked, with a note: '(a reminder email will be sent to you on the reminder date if this box is checked)'.

 At the bottom of the form are 'Save & close' and 'Cancel' buttons.

Job Quote Definitions

-A job quote is made up of many parts:

- There is the **Job Identification, Job Value, Winning Customer Accounts, General Account Information, and Our Project Specific Results** where information about the project is entered.
- The **Status Update** which represents the running list of updates for through the lifecycle of the Job Quote.
- The **Architecture Budgets** where the A&D rep will enter the budget information for the architect.
- The **Quoted Dealer** where the sales rep will enter the quoted information for the customer and “send” the job job quote.
- The **Dancik Sales** where the order is attached to the Job Quote.

The screenshot displays the 'The Belknap White Group' software interface. The top navigation bar includes 'My Apps', 'Daily Sales', 'BWG Email Central', 'BWG Job Quote', and 'New App'. The main navigation menu shows 'Home', 'Users', 'Job Quotes', 'Quoted Dealers', 'A&D Firms', 'Customer Accounts', 'Prospects', 'Call Reports', 'Dancik Sales', and 'Pri'. The current view is 'Job Quotes > JQ-7809' with a '+ New' button and 'Reports & Charts' link.

The 'New Job Quote Form - Job Identification' section contains the following fields:

- Job Quote #: JQ-7809
- Specifier Rep BWG (User): [Empty]
- Specifier Rep (Mfg): [Empty]
- Dodge Number: [Empty]
- Project Name: Test
- PROJECT Location - City: NY
- PROJECT Location - State: NY
- Job Type: Negotiated - Contractor
- Channel: Mixed Residential
- Project_Stage____ (DODGE/BWG) when AWARDED add projected order date: B: Quoted
- Project Stage: Quoted
- End User / Contact: [Empty]
- Internal_Project_Note____ Please write spec info here.: [Empty]
- Most_Recent_Status_Update (author & date) abbrev. (Remember to update Project status): test
- All Rep Userids on all Winning Dealer Quotes: Derek Morrocco 11-18-2019
- All Rep Userids on on: Brett Coleman, Cliff, Steve O'Neill

The 'Job Value' section shows a table with the following data:

Estimated Job Value	Total Job Value	Job_Value_Summary_Breakdown by Cost Center	Total Job Value AOT (Ceramic)
\$1	\$5,005	AOT:(Ceramic) \$5000 ARM:(Armstrong) \$5	\$5,000

Search Jobs



-Select the “Job Quotes” icon at the top.

(Alternatively you can use one of the filters on the Homepage, or enter a JQ number to go to the Job Quote Directly.)

-Filter this page of “Job Quotes”, by using the filters on the left, or typing keywords into the search at the top. *Filter by “I am involved in this job” as “Yes” to see all of your jobs.)*

-Click on a specific “Job Quote” to open it, or click “+New Job Quote” to create a new Job Quote.

-Click on any of the blue underlined items, to jump to the information about that item including adding a “Status Update” to a job.

-You can edit all information in your “Job Quote,” by selecting “Edit” in the top right corner.

Create a Job Quote

-To create a new “Job Quote” select “Add a new Job or Quote” or “+New Job Quote” in the top right corner.
Be sure to search through existing Job Quotes first to avoid creating a duplicate.

-Enter the **Job Details**.

The required fields are “Project Name”, (this should be an address or name of the institution), “Project Location” both city and state, the channel and the “Estimated Job Value.”

If you’re entering a job on behalf of someone else, select the person’s name “Originated By (Manual Override).” Otherwise this will default to your name.

Enter any other details you may have.

-Enter the **A&D firm** associated to the project, if applicable.

-Enter the **General Contractor** associated to the project, if applicable. [Save](#)

-Enter any project specific information for our internal use such as an estimated date for “Projected Order Date.”

-When done click “Save & Close.”

–Once created, the Job Quote will be assigned a JQ number. This will become the main way to track this opportunity through the process from specification to order. Users will add “Status Updates,” “Architectural Quotes,” “Quoted Dealers,” and “Orders” associated to the JQ number. Click the item to “Edit.”

The screenshot displays the 'New Job Quote Form - Job Identification' in a web application. The form is organized into several sections:

- Job Identification:** Includes fields for 'Job Quote #', 'Specifier Rep (BWG/Spec)', 'Dodge Number', and 'Originated By (Manual/Override)'. Each has a 'Make a Selection...' dropdown.
- Project Details:** Includes 'PROJECT NAME', 'PROJECT Location - City', 'PROJECT Location - State', and 'Job Type'.
- Channel and Stages:** Includes 'Select Channel', 'Project Stage (Dodged)', 'Project Stage (Submitted)', 'Project Stage (ECR/ARC)', 'Bid Size', and 'Bid Size Contact'.
- Internal Project Note:** A text area for notes with a placeholder 'Please write your info here...'.
- Job Value Summary:** A table with columns: Submitted Job Value, Total Job Value, Job Value Summary Breakdown by Cost Center, and Total Job Value NOT Covered.

Status Update

-On the Job Quote select "Add Status Update."

-Fill in the necessary information including the note entry and date if you'd like a follow up email.

-Select "Save and Close."

-On your job quote you'll be able to push your Status Update to a Call Report to connect your status update to your Call Reports.

The screenshot shows the 'Add Status Update' form in the software. At the top, the header reads 'The Belknap White Group' with navigation icons and a user profile 'Hi, Derek Morrocco'. Below the header is a menu bar with options like 'Home', 'Users', 'ACCT-CAT to Reps', 'Status Updates', 'Item Classes', 'Sample Library Catalo...', 'Sample Placements', 'User Focus', 'Originated By', and 'Specif'. The main form area is titled 'Status Updates > Add Status Update' and includes a 'Save & close' button and a 'Cancel' button. The form contains the following fields:

- JQ#**: 9108
- Project Name, City, State**: Wyndham Hospitality (Howard Johnson) Middletown, RI Middletown, RI
- Project_Stage**: D: Bidding - Flooring Contractors B: Quoted
- Value**: \$27,308
- Notes Entry**: A large text area for entering notes.
- Notes**: A section for additional notes.
- Follow up date**: A date picker field with a calendar icon.
- Remind me on the followup date?**: Radio button options for 'Yes', 'No', and 'None of the above'. A note below states '(the default behavior is to send a reminder on the follow update)'. The 'Yes' option is selected.

At the bottom of the form, there are two buttons: 'Save & close' and 'Cancel'.

Architect Budget Price

-On the Job Quote select "Add Quoted Architect Budget Price."

-Select a manufacturer code for the product you're quoting, and select the product from the drop down or add product from the free form entry.

-Add the price, unit of measure, area in Square feet, comments, and if you have an alternate or competitor.

-Select "Save and Close."

The screenshot shows the software interface for 'The Belknap White Group'. The top navigation bar includes 'My Apps', 'Daily Sales', 'BWG Email Central', 'BWG Job Quote', and 'New App'. The user is logged in as 'Hi, Derek Morrocco'. The main menu includes 'Home', 'Users', 'Instructions', 'Mfgr codes', 'Quoted Architect Bud...', 'Architect Contacts', 'Dancik Extract of Bill T...', 'ACCT-CAT to Reps', and 'Status Updates'. The current page is titled 'Quoted Architect Budget Prices > Add Quoted Architect Budge...' with a 'Save & close' button and a 'Cancel' button.

The form contains the following fields:

- Job Quote - PROJECT NAME
- Related Job Quote
- Manufacturer Code: Search and select
- Quoted product select drop down record id#: First choose Manufacturer Code
- Product Free form Entry
- Architect Budget Price
- U/M
- Area in SF
- Architect Extended Total Budget \$0
- Seq. #
- Comments
- Spec or Alternative
- Competitor
- Cost Center

At the bottom of the form, there are 'Save & close' and 'Cancel' buttons.

Quoted Dealer

- On a Job Quote, select “Add Quoted Dealer.”
- Select the Customer Account you will be quoting, and add a Contact if you have one.
- Select “Save and Close”
- Select “Add Quote Product” or select “Add 5 Quote Product Lines” if you have multiple products.
- Add the Manufacturer’s Code and the Quoted Product by using the search or the free form entry. add the Price, Unit of Measure, and Area for the quote.
- Account Notes are visible to the Customer, and Internal Notes, are only visible to BWG employees.
- Select “Save and Close”
- Finally use the “Display Dealer Quote Form” to view the Quote, the “Copy this Quoted Dealer” to copy the quote for another customer, or the “email this Dealer Quote to me” to email the dealer quote to yourself and forward it on to the customer.

The screenshot shows the 'The Belknap White Group' software interface. The top navigation bar includes 'My Apps', 'Daily Sales', 'BWG Email Central', 'BWG Job Quote', and 'New App'. The main content area is titled 'Quoted Dealers > PORT MORRIS TILE & MARBLE...' and includes a 'Reports & Charts' link. Below this, there is a summary card for 'PORT MORRIS TILE & MARBLE CORP' with details like 'Job Quote # JQ-1893', 'Project Name Harvard Square Hotel Cambridge, MA', and 'Effective Quote Date JAN-13-2012'. Action buttons include 'Display Dealer Quote Form', 'Copy this Quoted Dealer', 'Toggle as Winner', 'Toggle as PO placed with BWG', and 'email this Dealer Quote to me'. Below the summary card are two buttons: 'Add Quote Product' and 'Add 5 Quote Product Lines'. A 'Note' section provides instructions for using the 'Add 5 Lines' button and for importing data from Excel. At the bottom, there is a table with columns: Mfg Name, Mfgr code, Quoted Product, Quoted Price, U/M, Area in SF, SF/CT, Extended Quote Value, Seq #, Contractor Notes, Internal Comments, Sales Rep Code, Sales Rep Name, and delete. The table currently shows 'No quote products found'.

Quoted Dealer cont.

-Remember to tell your customer to always provide the JQ number when they call in a job to honor the special pricing in the quote.

The Belknop White Group + ★ 🔍 ? ⓘ | Hi, Derek Morrocco ▾

My Apps | Daily Sales | BWG Email Central | **BWG Job Quote** | New App

Home | Users | Job Quotes | **Quoted Dealers** | A&D Firms | Customer Accounts | Prospects | Call Reports | Dancik Sales | Price Classes | Instructions

Quoted Dealers > PORT MORRIS TILE & MARBLE... ✎ Edit ✉ Email ⋮ More ▾

▶ Reports & Charts

THE BELKNAP WHITE GROUP
HARD SURFACE FLOORING SOLUTIONS
800-283-7500

PORT MORRIS TILE & MARBLE CORP
BOSTON
Contact: Tom McCarthy

Project
Harvard Square Hotel
Cambridge, MA

Project Notes for Bidders

Job Quote # [JQ-1893](#)

***** Attention *****
You must quote the Job Quote # and the Project Name when placing the order in order for these special Job Quote Prices to be honored.

Originated By Territory Sales Rep(s)
Mark Walsh

Effective Quote Date A & D Firm, State
JAN-13-2012 Arrowstreet, MA

GC Awarded GC BID DATE Start Date Target Completion [DJQ](#)

Quote Products

Mfg Name	Quoted Product	Quoted Price	U/M	Area in SF	SF/CT	Extended Quote Value	Contractor Notes
No quote products found							

Note: Unless otherwise noted, Price quotes expire six months after the Effective Quote Date. Prices are not reflective of any applicable tax.

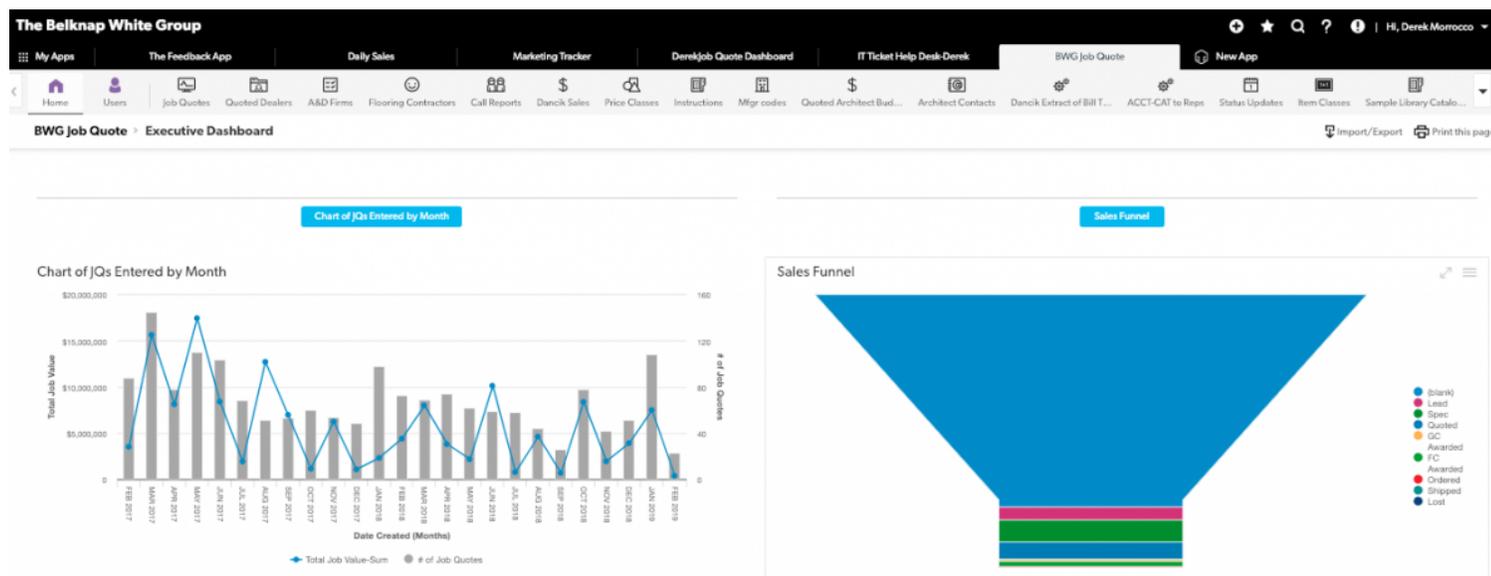
Executive Dashboard

-On the Homepage, click the “Executive Dashboard” link to the left.

-Click the filters on the bottom to filter through the dashboards.

-Click the button above the chart, or click on the chart, to get to specific quotes.

-These boards are used by management to view the pipeline of projects coming in, as well as to filter through passed projects. It can be a useful tool to sift through information visually.

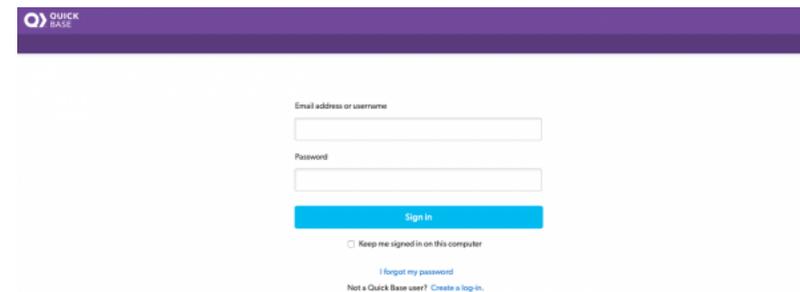


Login: Daily Sales

-To login

use: <https://bwg.quickbase.com/db/main?a=signin>

-To go to “Daily Sales” you can click the app or you should receive an automated email with your daily sales that you can click through to get to Quickbase.



The screenshot shows the Quickbase login interface. At the top left is the Quickbase logo. Below it is a purple horizontal bar. The main content area contains a login form with the following elements: a label 'Email address or username' above a text input field; a label 'Password' above another text input field; a blue 'Sign In' button; a checkbox labeled 'Keep me signed in on this computer'; a link 'I forgot my password'; and a link 'Not a Quick Base user? Create a log-in.'.

Daily Sales

-You should have a summary of all of your “Daily Sales”.

-Items will be flagged with a low Gross Profit:  .

–Any items that look strange should be reported to customer service by 4pm the next day. In addition, if a sale should have a “Job Quote” attached, it should also be reported to customer service. If an item needs a price change this should be forwarded to a product manager for approval, along with the product administrator who can make the system update

Daily Sales > Home Page Import/Export Print this page Customize this Page

Settings

▼ INFO

This is a daily detail report of today's new orders. Reqs, please review the pricing and report any problems. Managers and Internal support staff will see Summaries on their Dashboard Page.

▼ List All

Full Report | Grid Edit | Email | More ▼ 1-200 of 1210 Order Lines

ACCT NAME	Item Desc	QUANTITY	UNIT PRICE	U/M	EXTENDED PRICE	GP%	GP% I	ORDER#	Discount	Unit price after discount	JQ# (Number)	Job Name X's Desc	JQ# Project Name	JQ# Project Stage (SWC)	Mfg Name
<i>(empty) (1210 Order Lines)</i>															
⊞ A & A CERAMIC	BRIGHT WHITE 8 LBS.	1	\$19.09	EA	\$19.09	29.5%		421		\$19.09		BOB			LATICRETE INTERNATIONAL INC.
⊞ A & A CERAMIC	RAVEN 8 LBS.	1	\$19.09	EA	\$19.09	29.5%		421		\$19.09		BOB			LATICRETE INTERNATIONAL INC.
⊞ A & A CERAMIC	STERLING SILVER 8 LBS.	1	\$19.09	EA	\$19.09	29.3%		421		\$19.09		BOB			LATICRETE INTERNATIONAL INC.
⊞ A.C TILE	70222 X-LARGE SPONGE SALE	3	\$2.14	EA	\$6.42	45.5%		699931		\$2.14					
⊞ A.J. ROSE CARPET & RUG	ALTERNA BETCHA BLACK DB	1	\$8.33	EA	\$0.00	0.0%		112	-100%	\$0.00		LOCHER			ARMSTRONG WORLD INDUSTRIES, INC
⊞ A.J. ROSE CARPET & RUG	ALTERNA WHITE DB	1	\$8.33	EA	\$0.00	0.0%		112	-100%	\$0.00		LOCHER			ARMSTRONG WORLD INDUSTRIES, INC
⊞ A.J. ROSE CARPET & RUG	CUSHIONSTEP BETTER DTD 12"	17.33	\$11.23	SY	\$194.62	24.7%		191		\$11.23					ARMSTRONG WORLD INDUSTRIES, INC
⊞ A.J. ROSE CARPET & RUG	LINDART COLORETTE 2.5MM	4	\$17.31	SY	\$69.24	42.7%		87		\$17.31		EMAIL SL			ARMSTRONG WORLD

Email A Record

-To email a record, click on an item, and click email in the top right corner.

-Add the email address you would like to send to in the “Enter email addresses” section. You can add multiple emails by adding a semi colon (;).

-Click “Send Email” in the top right corner.

-*You can test this by using your own email address.*

Order Lines > Email a Record (Order Line #3234750)

Settings Reports & Charts Send Email Cancel

Enter email addresses, Quick Base user names or group names of those to whom you would like to send this order line:

or: [Browse Users](#)

Add a personal subject:
Order Line #3234750 (from Daily Sales)

Add a personal message:
Denik Morocco emailed you a order line from the Quick Base application Daily Sales.

Daily Sales: Order Lines (Order Line #3234750)

Main Form

ACCT NAME	Acct #	Job Name Xtra Desc	JG# Hyperlink to JG
A & A CERAMIC	063150	BOB	
Item Desc	Item #	Mfg Name	Flag Daily Sales below GP% of
BRIGHT WHITE 8 LBS.	LAT25448LB	LATCRETE INTERNATIONAL INC.	15%

Trainings and More

If you have any questions or need more information, contact **Steph Betro**,
800-283-7500 x7915
Stephanie.Betro@belknapwhite.com

Or view the training:
<https://www.belknapwhite.com/sales-rep-tutorial/>

PW: Salesrep

The screenshot shows the website's navigation bar with the logo on the left and links for Products, Company, Resources, A&D Services, Careers, Contact Us, and Order. A phone number 1-800-283-7500 is displayed on the right. The main content area features a large heading 'SALES REP TUTORIAL' with the instruction 'Please select from the following tutorials.' Below this, there are five buttons: SALESportal, RADAR, QUICKBASE, DROPBOX, and DECOR24. A 'DOWNLOAD CHEAT SHEET' button with a download icon is positioned above the QUICKBASE button.