



WBM Q2 Dealer Procedure

<http://config1.wbm-online.com>

Username:

Password:

Requirements: Internet Explorer 8.0

3 Easy Steps To Build A Quote

1.) Create a Quote:

Click Create Quote

Select Customer at bottom of page

If customer doesn't exist, Add New Customer

Click Line Items

Click New Line Item Configuration

From the drop down menu next to New Configuration, Select Therma-Tru Door

Click Go

(A Configuration Name is automatically assigned)

Click Continue

Select Door Type

Click Continue

Select Options (work from top to bottom of screen)

Click Continue

Click Configure

Click Add To Quote at top right

(*if you click Return To Quote, the door you just configured will NOT be added to the quote)

2A.) If you don't need to add any other doors or items to the quote:

Click Build Quote

Click Build Quote

Click View Dealer List Quote

PRINT Click Print Icon

Select printer

Click OK

OR

EMAIL Click Email Icon

Send Page by Email

Select email address

Send



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2B.) If you need to add more doors to the quote:

Click New Line Item Configuration

From the drop down menu next to New Configuration, Select Therma-Tru Door

Click Go

(A Configuration Name is automatically assigned)

(Customer is automatically assigned)

Click Continue

Select Door Type

Click Continue

Select Options (work from top to bottom of screen)

Click Continue

Click Configure

Click Add To Quote at top right

(*if you click Return To Quote, the door you just configured will NOT be added to the quote)

Repeat as needed depending on the number of doors that will be on the quote

When you are finished adding doors:

Click Build Quote

Click Build Quote

Click View Dealer List Quote

PRINT Click Print Icon

Select printer

Click OK

OR

EMAIL Click Email Icon

Send Page by Email

Select email address

Send

3.) Click My Home



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Convert a Quote to an Order

1A.) Convert a Quote to an Order immediately after you Build Quote:

Click Request Order

Enter Your PO#

Click Send

Click My Home

You will receive an order confirmation by email or fax

1B.) Convert a Quote to an Order from My Home:

Click View Quotes

Locate Quote and Click Results

Click Request Order

Enter Your PO#

Click Send

Click My Home

You will receive an order confirmation by email or fax

To make a shortcut on your computer desktop directly to the Q2 log-in screen...

Open Internet Explorer (make sure you have Internet Explorer 8)

Go to <http://config1.wbm-online.com>

Right-click on any white part of the screen and select Create Shortcut

Click Yes to add a shortcut to the website to your desktop

Questions, Comments or Suggestions?

Call us at 800-886-1963 and let us know what you think...

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