E-COMMERCE USER MANUAL

For Customers





Web Order Fulfillment



After placing your order, you will receive a confirmation email notification.

Our branch team and your sales representative will be notified.

The team will review your order. If everything is correct, your order will be picked.

We may contact you to confirm and prevent accidental ordering.

Once your order has been picked, you will be notified that your order is ready for pick-up. If your order is being delivered through your customer carrier, they will provide you with the shipping details.

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Account Management

Creating An Account

Register:

• From the homepage, create a new account by selecting the "Register Now" button. Start by selecting the user icon in the top right of your screen.



Download the Application:

- After selecting "Register Now", select the "Download" button to download the Website Administrator Application.
- Fill out the application and return it to the Bartle & Gibson credit department at creditapps@bartlegibson.com.

Get Your Access

Website Administrator Application

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Assign/Edit Ship-Tos
 View & Approve Requisitions
 View Invoice History
 View Order History

Approve Orders
 View Saved Orders
 Save Orders
 Reguest/View/Manage Quete
 Add/Edit/Delete Product Lists

Activate Your Account:

 Once your account has been set up by our team, you will receive an email notification to activate your web account.

۲ ^۲ bartle & gibson
Welcome User,
Thank you for choosing Bartle & Gibson Wholesale, Western Canada's leading distributor of plumbing, heating, and electrical products.
Activate your online account to:
 FIND products by easily searching our huge selection and find local inventory.
 ORDER online anytime, and easily place reorders.
 ACCESS your live account pricing, and account information (invoice History, Order History, and more).
 MANAGE your Quotes, Project Lists, Account Settings, and more (for account holders only).
The link below is good for a single use and will remain active for 7 day(s).
ACTIVATE ACCOUNT
2024 Bartle & Gibson, All Rights Reserved.

Sample email

Recover or Change Password:

 If you have forgotten or need to change your password, select "Forgot Password?" to update your password. (you cannot recover your password, but only update it).

Please Sigr	n In
Email	
Password	۲
	Forgot Password?
5	SIGN IN
Don't have an a	ccount? Register Now

^f , 0 bartle & gibs	SON Shop By Category ~			Q Search	Hello {Name}
					My Account
1 ST Pallin				Land CX	Addresses
Welcom	e to Bartle &	Gibso			Invoice History
Western Canad					Order History
heating, and ele					Project Lists
FIND OUT MORE					Quotes
					My Distorer Dinotes
Project Lists	Quick Order				
Order Approval	QUICK OTUEI			0724	Upload an Order Order Multiple Items
Order History Quotes	Search			QTY - 1 +	
Saved Orders					
Saved Payments	Recent Orders	View All→			
My Customer Quotes	DATE	ORDER #	STATUS	WEB ORDER #	TOTAL
User Administ	ration				+ Create Ne
Q User Search		SEARCH			
31 Users					
(Create User			×	
E	mail *		First Name *		
L	ast Name *				
s	Settings				
A	kssign User Role		Assign Approver		
	Select User Role		 Select an Approver 	~	
	Allow My Customer Quotes				
	CREATE USER CANCEL				

Creating Additional User Accounts

1. Access User Administration:

- Administrators can create or assign different user accounts by selecting "Hello, [Your_ Name" or "My Account" in the account section.
- From the left menu options, select "User Administration".

2. Create a New User:

• Select "Create New User" to add an additional user account.

3. Assign Roles and Approvals*:

- Assign a role to the new user using the dropdown menu.
- Assign who approves their purchases using the dropdown menu.

*Refer to the User Permissions Table below for details on roles and permissions.

User Permissions Table

PERMISSIONS	ADMINISTRATOR	BUYER 3	BUYER 2	BUYER 1
General Capabilities for Approving & Ordering	User Admin & Approver by Default	Able to Place Orders Without Approval & Can Act As Approver	Able to Place Orders Without Approval Within A Specified Budget	All Orders Placed Must Be Approved
Access/Configure Budget	O			
Create New Users				
Edit/Deactivate Users	O			
Assign/Edit Ship To	0			
View & Approve Requisitions	0			
View Invoice History	S			
All Orders Require Approval				
Orders Over x Require Approval			0	
Approve Orders	0	S		0
Save & View Saved Orders	0		0	0
View Order History	S			
Request/View Quotes	S			
Add/Edit/Delete Project List		S	S	S

Settings

Assign User Role		Assign Approver	
Select User Role	~	Select an Approver	~
Allow My Customer Quotes			

Select box if user is allowed to send out quotes to your customers using the My Customer Quotes tool. When satisfied, click "Create User" to complete.

Adding or Updating A Payment Method

1. Navigate to Saved Payments: From your account dashboard, select "Saved Payments".



2. Add a New Card:

- · Select "Add Card".
- · Enter your card details.
- If you want to make this your default card, check the box labeled "Make default".

3. Enter Billing Address:

- Enter your billing address.
- To auto-fill your billing address, select "Copy address from Bill To".
- · Save Your Details:
- Once you're satisfied with the information, select "Save".

Make default				Copy address from Bill To			
Card Nickname				Address Line 1 *			
Card Number *				Address Line 2			
Name on Card *				Address Line 3			
Expiration *				Address Line 4			
July	~	2024	~				
				country *		Province *	
				Canada	~	AB	~
				City *		Postal Code *	

Adding or Updating Shipping Address

1. Navigate to Addresses: From your account dashboard, select "Addresses".

2. Add a New Address:

- · Select "Create New Address".
- Enter the required details.
- Once you're satisfied with the information, select "Save".

3. Update an Existing Address:

- Find the address you want to update and select "Edit" below it.
- Update the necessary details.
- Once you're done, select "Save".



Create New Address

First Name

Last Name

Edit Shipping Information

First Nam	e		
Company	Name		
Apero T	est		
Address 1			
889234	Whyte Avenu	le	

Note: to update your billing address, you will need to send an email to the credit department at credit-apps@bartlegibson.com with the updated address.

Order History

How To Access

Once you are logged in, order history can be found on the "My Account" drawer and My Account page. You can also see your recent orders on your My Account page.



Find an Order

Once you are viewing the order history you can select the arrow beside "Filters" to show your filterable options and narrow down your order history list.

Order History

Filters								~
10 orders								
DATE 🗘	ORDER # 🗘	REQUEST DATE	SHIP TO / PICK UP 💲	STATUS 🗘	WEB ORDER # 🔅	PO/REF NUMBER 💲	TOTAL 🗘	ACTIONS
8/16/2022	541973	8/17/2022	Edmonton North Side 13475 Fort Road Edmonton AB	Order Complete	WEB001060	test	\$1.37	REORDER
	507855	7/22/2022	Edmonton North Side 13475 Fort Road Edmonton AB	Requested	WEB001043		\$2.36	REORDER
7/19/2022	503052	7/20/2022	Edmonton North Side 13475 Fort Road Edmonton AB	Order Complete	WEB001039	or405	\$322.45	REORDER
7/19/2022	501915	7/29/2022	Apero Calgary 307 valley springs terrace NW Calgary AB	Order Complete	WEB001037	4543543	\$8.19	REORDER
7/8/2022	488251	7/9/2022	Edmonton North Side 13475 Fort Road Edmonton AB	Shipped	WEB001031	PO #4	\$2,131.77	REORDER
7/7/2022	486476	7/8/2022	Edmonton North Side 13475 Fort Road Edmonton AB	Order Complete	WEB001028	Po # here test	\$2.36	REORDER
7/6/2022	484106	7/13/2022	Edmonton North Side 13475 Fort Road Edmonton AB	Shipped	WEB001027	OR 4512	\$404.25	REORDER
7/5/2022	481904	7/5/2022	Edmonton North Side 13475 Fort Road Edmonton AB	Shipped	WEB001026		\$2.36	REORDER
							Show 9	× / 1 of 2

Order History

Filters								^
Product			P0 #	Order #	ľ	Date Range		
Enter keyw	vord or item #		0	2	3	mm / dd / yyyy	4 dd / y	yyy 🛄
Ship To			Status		(Order Total	Amount	
Show All			~ 5 Select		~ 6	Select	~ 7	
							CLEAR FILT	ERS
10 orders								
DATE 🗘	ORDER # 🗘	REQUEST DATE	SHIP TO / PICK UP 💲			STATUS 🗘	WEB ORDER # 🗘	PO/REF N
8/16/2022	541973	8/17/2022	Edmonton North Side 134	475 Fort Road Edmonton	AB	Order Complete	WEB001060	test
7/22/2022	507855	7/22/2022	Edmonton North Side 134	475 Fort Road Edmonton	AB	Requested	WEB001043	
7/19/2022	503052	7/20/2022	Edmonton North Side 134	475 Fort Road Edmonton	AB	Order Complete	WEB001039	or405
7/19/2022	501915	7/29/2022	Apero Calgary 307 valley	springs terrace NW Calga	ary AB	Order Complete	WEB001037	4543543

Finding an Order Cont

At the top of the Order History page you can efficiently locate specific orders using the following search criteria:

- 1. Product number or product keyword
- 2. Purchase Order Number
- 3. Order number
- 4. Date range when order was placed
- 5. The address the order was sent to
- 6. Order status
- 7. Order total

You can combine any of these criteria to refine their search and pinpoint the exact order(s) they are looking for.

Order History

								T
Filters								S
10 orders								0I hi
DATE 🗘	ORDER # 🗘 REQUEST DATE	SHIP TO / PICK UP 🗘	STATUS 🗘	WEB ORDER # 🗘	PO/REF NUMBER	TOTAL 🗘	ACTIONS	

The Order History table allows sorting of search results in ascending or descending order in any of the highlighted columns.

To view details of a specific order, simply select the hyperlinked date or order number. This view provides comprehensive information about the order, including the list of products, such as the shipping method, order notes, and order lines.

Order History

Filters								
10 orders								
DATE 🗘	ORDER # 💲	REQUEST DATE	SHIP TO / PICK UP 💲	STATUS 🗘	WEB ORDER # 💲	PO/REF NUMBER 💲	TOTAL 🗘	ACTIONS
8/16/2022	541973	8/17/2022	Edmonton North Side 13475 Fort Ro	Order Complete	WEB001060	test	\$1.37	REOR

From the order details view, you can perform the following actions:

- 1. Email the order details
- 2. Print the order details
- 3. Reorder all items

Order #484106		0 0	3
		🖬 Email \ominus Print	'굘 Reorder
		Order Summary	
STATUS: Invoiced PO NUMBER: 08 4512		Subtotal Tax	\$385.00 \$19.25
WEB ORDER #: WEB001027 ORDER DATE: 7/6/2022		Total	\$404.25
Billing Address	Pick Up Location		
Apero Test	Edmonton North Side		
889234 Whyte Avenue Edmonton, AB T8J 8H8 Can NOTES:	13475 Fort Road Edmonton, AB TSA 1C6 CAN		

Invoice History

How To Access

Once you are logged in, invoice history can be found on the "My Account" drawer and My Account page.

Finding an Invoice

At the top of the Invoice History page you can efficiently locate specific invoices using the following search criteria:

- 1. Product number or product keyword
- 2. Invoice number
- 3. Order number
- 4. Date range when the invoice was created
- 5. The address the order was sent to
- 6. Purchase order number

You can combine any of these criteria to refine their search and pinpoint the

The Invoice History table allows sorting of search results in ascending or descending order by any column.

To view details of a invoice, simply select the hyperlinked invoice number. (Select the Order Number, to view the order details page, where you can reorder products from that invoice and order). This view provides comprehensive information about the invoice including the list of products, the shipping method, order notes, and order lines.

From the invoice details view, you can perform the following actions:

- 1. View the details of an order
- 2. Print order details
- 3. Email the order details



Invoice History	
	ACCESS BG PAY
Filters	~
6 Invoices	
INVOICE # O ORDER NUMBER INVOICE DATE V TERMS O DUE DATE O SHIP TO / PICK UP O	PO # 😂 INVOICE TOTAL 🗇 CURRENT BALANCE 🛇
Invoice History	
<i>v</i>	
	ACCESS BO PAY
Filters	~

Filters								~
6 Invoices								
INVOICE #	ORDER NUMBER	INVOICE DATE $\ \backsim$	TERMS 🔅	DUE DATE 🔅	SHIP TO / PICK UP 💲	P0 # ⊖	INVOICE TOTAL	CURRENT BALANCE
928298		7/8/2022		7/8/2022	Edmonton North Side 889234 Whyte Avenue Edmonton AB	P0 #4	-\$2,131.77	\$2,131.77

						🖨 Print 📓 Email
					Invoice Summ	ary
INVOICE DATE 7/8/2022	SALESPERSON MARCO CANOSA	TERMS 2/15MF	PO NUMBER PO #4		Subtotal Tax	\$2,030.26 \$101.51
8/15/2022	Pickup				Total	\$2,131.77
Billing Informatio Billing Address Apero Test	n	Shipping Info Shipping Addres Edmonton North Sid	ormation s			
889234 Whyte Avenue Edmonton, AB T&J 8H8 Can		Edmonton, AB TSA 1 CAN	C6			
INVOICE NOTES test test						
				1000000		

Budget Management





How to Access:

- Administrators can create or assign different user accounts by selecting "Hello, [Your_Name]" or "My Account" in the account section.
- From the left menu options, select "Budget Management".

Purpose:

Budget Management is a tool that allows administrators to set budgets based on different criteria such as time frames, or fixed dollar amounts for various users in your company. It helps manage your team's budget effectively to ensure they stay within limits.

Page Overview:

Set parameters for budget:

- Enforcement level
- Year
- Budget period

Configure

- 1. Set enforcement level
- 2. Configure the budget based on year
- 3. Assign budget period
- 4. Save budget

Assign

5. Assign the configured budget to a user

Note: you will need to have created the user account before assigning them a budget.

- 6. Configure the budget for the user for that budget year
- 7. Save the assigned budgets

Project Lists

to bartle & gibson	Shop By Category 🗸	Brands	Downloads	Quick Order	٩	Search	CS 12	4
Home + My Account + Project Lists								
Project Lists								
Search Q. Search lists by name	Sort By Last Updated	×				NEW P	PROJECT LIST	1
Pipe Pro Projects Created Gr: 7/4/2024 by Chris Sagert		-	٠		47 Items Private	ADD LIST	T TO CART	ī
Wire Project List Created On: 7/4/2024 by Chris Sagert		_	_		10 Items Private 9	ADD LIST	TO CART	ī
ZenZone Redesigns Project Updated 0x: 6/14/2024 by Chris Sagert		pris-	1	1.[43 Items Private	ADD LIST	TO CART	i
SpaRetreat Renovations Updated Oc: 6/14/2024 by Chris Sagert			Nat		6 Items Private 🖗	ADD LIST	TO CART	i







Purpose

Project Lists is a tool that helps you organize and save products into individual projects that you plan to purchase in the future or products you purchase frequently for a certain type of job.

This saves time from having to find individual projects each time you need to order them for a job. Once a Project List is created, you can directly turn it into an order or a request for quote. You can even share lists to collaborate on Project Lists with others within your organization.

How to Access

There are three ways to access Project Lists:

1. Homepage:

Once logged in, scroll down on the home screen until you see a section titled "Project Lists". You can access your individual project lists by selecting the name, or you can view all of your lists by selecting "view all".

2. Account Drawer Menu:

Once logged in, select your initials in the upper right of bartlegibson.com (this will be a user icon when browsing web from phone) and a drawer menu will appear. Select "Project Lists" to be taken to your Project Lists page.

3. My Account:

Once logged in, select your initials in the top right of your screen and select "My Account" or your name. This will bring you to the My Account page where the Project Lists option will be.

your Project List. 5. Choose an existing group name or create a

3. You will be prompted to name your

1. Go to the project lists section.

2. Select "New Project List."

Project List.

new group to categorize the products in your Project List.

4. Provide a name and description (optional) for

Creating A New Project List

6. Select "Create Project List" to finalize.

Page Overview

The Project Lists page provides several features and actions:

Project List Details:

- 1. Displays the title, creation/modification date, and who it was shared with
- 2. Includes search options within the list
- 3. Allows saving the list as a PDF

User Actions:

- 4. Add items
- 5. Edit quantities
- 6. Remove items
- 7. Enter line notes
- 8. Move or copy items to another group





Project Lists



		_						
PDF Displa	iy Settings	1						`
Search Q Sea	rch products in list Select	All Products Add Items To List	Sort by	Choose Sort Type	✓ 3€ Pr	int All QR Codes	🕏 Create a N	lew Groi
ROUGH-IN 🖌			×				GRAND TOTAL: \$4	9.98 ^
Select All	Products Move to Choose a Group	Copy to Choose a Group		📋 Delete Group			ADD GROUP TO C.	ART
PRODUCT DESI	CRIPTION			PRICE/UNIT	QTY	TOTA	L	
	4/0 STRANDED BLACK	WIRE RW-90 ALUM (SHORTS)		\$7.20 / M	- 1 -	+ \$7.2	ADD TO CART	
	MFR Part #: RW-90 ALUM	SKU #: 0701821						
	0 IN STOCK	30 Print Q	Code				20	ne Notes
Search rw-90		✓ QTY - 1 +		A		. (1 Upload Ite	sms >
ROU: 🎩	12 SOLID BLACK WIRE RW-90 (300M) 50931						GRAND TOTAL: \$49	.98 ^ .
	12 SOLID BLUE WIRE RW-90 (300M) 50932	Copy to Choose a Group	~	🗑 Delete Group			ADD GROUP TO CA	IRT
PROD	12 STRANDED BLACK WIRE RW-90 (300M)			PRICE/UNIT	QTY	TOTAL		
_	50875	ERW-90 ALUM (SHORTS)		\$7.20 / M	- 1 +	\$7.20	ADD TO CART	
	12 STRANDED GREEN WIRE RW-90 (300M)	SKU #: 0701821						

FILTERS	^	9 Products	Sort by Best Match	~			
SEARCH TERMS	Clear All						
× Search: waltec							
		9	9		0		
SEARCH WITHIN CATEGORY		St. Ma	Dr. Hand	9	32	20	4.1
Q Search			Man	6	13	Car	
		2					
PREVIOUSLY PURCHASED	^		- Company		Company	-	Company
Previously Purchased Only		WALTEC 21E141LE LAVECT	WALTEC 92221LE LAVECT	MALTEC 9		WALTER 21E145	N E LAV ECT
STOCKED ITEMS	~	WALLED ZIT HILF LAV FUT	WALLED 0223 ILF DAV FUI	CENTRESE	ET LEVER HANDLE	WALLEG ZIE 143	ALL LAV POT
Stocked Items Only		MFR Part #: 21F141LF	MFR Part #: 82231LF	MFR Part #: 85	2234JF	MFR Part #: 21F143LF	
Home + + WALTEC 82234LF 4IN	CENTRESET LEV	ER HANDLE					Share 👼 Print
	1		WALTEC 822344 HANDLE	LF 4IN 9 #: 1164383 olished Chrome, 3	CENTRES Brand: Walter® 2 Handles, 1.5 gpm Flor	ET LEVER	170403710
			WALTEC 82234 HANDLE MIR Part R 8234// Wathedt 82234// Lexitory Facet, P \$95.12 / EA 0 27 IN STOCK - 1 ADD to car	LF 4IN 2 #: 1164383 olished Chrome, : 22 available with RT Proj	CENTRES Brand: Waltroot 2 Handley, 1.5 gpm Flor 4 Increased lead time ect List 2	UPC: 0550 w Rate	INT OR CODE
Fulfilment Metho		2	WALTEC 82234 HANDLE WRINE 822347 BKK WRINES 822347 Levelary Faces, P 995.12 / EA • 27 N 8100K (- 1 • ADD TO CA	LF 4IN J.F. 1164383 Olished Chrome, 2 22 anslable with RT	CENTRES Pend: Walked 2) Henders, 1.5 gen Flore Hencessed Hot Pen 2	ET LEVER urc 555 Rate	ton coor
Fulfilment Metho Pecup	d • Delivery		WALTEC 82234 HANDLE With Heat 822347 State 1 S95.12/EA 0 1 AND TO CA	LF 4IN J #: 116433 22 oraslable weth RT D Drop	CENTRES Brend Withold 2 Nandes, 15 gam For Increased land time act Litt 2	ett LEVER urc 555 e Rate	лэжээлэ инт он соон / \$231.2
Fulfilment Metho Peaug	d © Delirery		WALTEC 82234 HARDLE NIR Part 8: 82341 Woheel 82341 S95:12 / EA 0 27 NI STOCK - 1	LF 4IN	CENTRES Bund Wilson 2 Handles, 15 gam Flor Interacted Biod time Ret Liter	ET LEVER urc 655 * Rate Order Summary Subtotal	179603710 HNY OR CODE / \$231.2
Fulfilment Metho Pos Up	d © Delivery All to Project I		WALTEC 82234 MIR Puri R 122347 Bits Wahres 822341 Leastary Faces, P 995.12 / EA 927.11 ETOCK - 1 400 TO CA	LF 4IN Jeithed Chrome, 1 22 anallable with PT	CENTRES Brief Valued Henden, 1.5 gen For Annesed Hell The Centre of Annesed Hell The Centre of Annesed	ET LEVER urc 0194 v Rate Order Summan Subtotal Cetto e Report Co	INT OR CODE
Fulfilment Method Pekup 0 3 1 6 667 FROMETS	d © Delivery All to Project I		WALTEC 82234 HEADLE MIR HAI & 22347 EX Wolkes 822347 Leandary Faust, P 995.12 / EA • 27 N 8100 K - 1 • ROB 100 CA	LF 4IN 22 milliohed Chrome, 1 22 milliohed chrome, 1 22 milliohed chrome, 1 Projo	CENTRES Rend Valued 2 Handan, 1.5 gam Flor exet Latr 2 Company Rensear All 1000000 All 1000000 All 1000000 All	er LEVER urc: 054 e Rate Order Summan Subtotal Cener Gu	076409710 INIT OR CODE
Fuffilment Method Pos.up Teorers Process	d O Delivery All to Project I 	AT	WALTEC 82234 MIR.Putr.R. 122347 BR Wisheel 8223417 Leastern Francel, P \$955.12 / EA 0.27 /H ETOCK (I - 1 - 1 - 1 - 27 /H ETOCK (I - 1 - 1 - 1 - 1 - 27 /H ETOCK (I - 1	LF 4IN PE116C33 22 aratable with RT Proj	CENTRES Rest: Wated 21 denders, 1.3 gen Flet accessed foot tree exclusion 2 denders 2	ET LEVER urc oss e Rase Crider Summary Subtotal Criter Summary Subtotal	UNIT OR CODE

Adding items to a Project List

You can add items to a Project List in three ways:

1. Adding Items Within Your Project List:

- Once your Project List is created, you can add items by selecting "Add Items to List."
- Search for your product by SKU, manufacturer part number, or a key phrase.
- · Once found, select "Add Item to List."
- You can also add items using the "Upload" function with an Excel file or a commaseparated values file (CSV, XLS). Please follow the upload requirements for necessary details.
- 2. Adding Items From a Product List or Details Page:
- Use the universal search tool on the web store (learn more about search on page 22) to search for the product by SKU, Manufacturer Part Number, or Key Phrase.
- If a list of products appears, find your desired product and select "+ Project List."
- On the product details page, you can also add the product to a project list by selecting "+ Project List."

3. Adding Items From Checkout Page:

- Items can also be added to a list from your checkout screen if you are not ready to purchase and want to save them for later.
- Select your cart, then select "Checkout."
- You can individually add items to your project list by selecting "+ Project List" next to each item.
- Alternatively, add all items in your cart to the project list by selecting "Add All to Project List."

Exporting A Project List

1. Customize PDF Export Options:

- At the top of the Project Lists page, choose whether to include spec sheets.
- Select whether to display multiple items per page or just one item per page.

PDF Display Settings				
Which options would you like to include in th	ie pdf?			
Email Address	PDF Options			
	Spec Sheets			
	Product Page Options			
	Products in line item form	nat		
	Products on individual pa	iges		
			B SAV	E PDF
			in the second	

\$0.98

- 1 +

\$0.98

2. Select Displayed Product Image:

 For each product, select the side arrow next to the product image to choose which image to display in the exported list (if multiple images are available)

3.	Save	(Exported	as	PDF)	or	Email	Project	List:
----	------	-----------	----	------	----	-------	---------	-------

- Enter an email address to share the list as a PDF.
- Choose to email the list or save it as a PDF (for printing or sending through another method).

		REQUEST QUUTE	ADD LIST TO CART	
Jpdated on 7/4/2024 by Chris Sagert Private 🕢				
PDF Display Settings				^
Which options would you like to include in the pdf?				
Email Address	PDF Options			
name@emailaddress.com	Spec Sheets			
	Include Price			
	Product Page Options			
	Products in line item format			
	Products on individual pages			
		E	SAVE PDF	DF

2 ABS COUPLING

MFR Part #: COUPLING

SKU #: 0174210

4. Exporting as a CSV/Excel

- At the top of the Project Lists page, select the three verticle dots to display more options.
- Select 'Export' to export your list as a CSV/ Excel file.

	ADD LIST TO CART
datad on 7/17/2824 by Chris Sagart Private 🖗	Create My Customer Quote
DF Display Settings	Schedule Reminder
	Сору
of A second difference with the second s	Export
aren U seiren products in ist Select All Products 🖸 Add items to List Sort by Choose Sort Type 🗸 🖉 Print All QK Codes	Delete

Placing Orders from a Project List

- 1. Request Special Pricing (Quote):
- If you need special pricing, select "Request a Quote" at the top right of the Project List page. Your account manager will respond promptly.
- 2. Add Items to Cart:
- When you're ready to place an order, select "Add List to Cart" at the top right corner of the Project List page.
- You can also add individual items to the cart by selecting the "Add to Cart" button next to each product.
- 3. Proceed to Checkout:
- Follow the checkout process to order the items listed in your project list.



To save you time, You can use the import functionality to add multiple products to the list at one time.

- 1. In your project list select "Add Items To List"
- 2. Select "Upload Items" to add multiple products at once.
- You can choose to download the template or create your own spreadsheet that includes the following fields: Product, Unit of Measure, and Qty Ordered. Fill in the details and then save the spreadsheet.
- 4. Select "Choose File" to search for your file, then select it, and then select " Upload File".





Upload Items To List

Upload an Excel (.xls or .xlsx) or CSV (Comma-Separated Values) file to quickly add item(s) to your list.



Second column - add quantities (optional).
 Third column - add unit of measure (optional)



Requesting a Quote from a Project List Workflow



Requesting a Quote from the Checkout Page Workflow



Purpose

The Quote tool allows you to request pricing for a product or group of products from your Account Manager. Your Account Manager will then return the quote with the special pricing, and you can choose to accept or reject the quote.

Methods for Requesting a Quote

You can request quotes using two methods:

From a Project List:

- Navigate to your project lists.
- Select or create a project list you would like to be quoted (follow the prompts on page 12 to generate a project list).
- Request Quote (Follow the instructions on page 16).

From the Checkout page:

- Add items to your cart.
- · Access the checkout page.
- Request Quote (follow the instructions on page 17 to request a quote from your entire cart or partial products from your cart).





								7		
Wire Pro	ject List 🚈					REQUE	ST QUOTE	A	DD LIST TO CART	
Updated on 7/4/2024 by Chris 5	Sagert Private 🖗									
PDF Display Settin	ngs									~
Search Q, Search product	s in list Select All	Products	Sort by Choo	ose Sart Type	~	38 1	Print All QR Cod	es	🚸 Create a 🕅	lew Group
ROUGH-IN 🖌									GRAND TOTAL: \$4	9.98 ^
Select All Products	Move to Choose a Group	Copy to Choose a Group	~ # D	elete Group					ADD GROUP TO C	ART
PRODUCT DESCRIPTION			PI	ECE/UNIT		QTY		TOTAL		
	4/0 STRANDED BLACK W	IRE RW-90 ALUM (SHORTS)	\$7	7.20 / M	-	1	+	\$7.20	ADD TO CART	Ŧ
	MFR Part #: RW-90 ALLIM	5100 #: 0701821								
	0 IN STOCK	30 Print 0	2R Code						10	ne Notes
	1 STRANDED BLACK WIR	E RW-90 ALUM (SHORTS)	\$3	8.75 / M	-	1	•	\$3.75	ADD TO CART	÷.
	MFR Part #: RW-90 ALLM (SHD	5100 #: 1007566								



How-To Request a Quote from a Project List

1. Add Items to a Project List:

- Once you have created a project list with the desired products, select "Request Quote" at the top of the project list.
- (You may also select the individual check boxes for specific items in your project list and only request a quote for those items).
- You can add, remove, or change products in the quote at any time.
- 2. Request a Quote:
- This action will take you to the "Request a Quote" page. Here, you can:
- Verify the products you want to be quoted on.
- Add additional items to the quote.
- Create and organize products into groups.
- Add notes to individual products or to the entire quote for your sales representative to see.
- Any step throughout the quote process you can send a message to your account manager. This feature can be found at the bottom of any created quote. Once a message is submitted (by selecting the "Send Message" button), the account manager will receive a notice about the message. They can then choose to reply to the message, where you will receive a notification about their reply.
- 3. Finalize Your Quote:
- When you are satisfied with your quote, select "Submit Request" to finalize it.
- 4. Wait for Notification:
- Wait for an email notification that your Sales Rep has reviewed and provided a quote (you will also be notified when you login if your quote has been proposed).
- 5. Review the Quote:
- If you are satisfied with the quoted price, select "Order" to add the items to your cart.
- If you reject the quote, provide notes explaining why. The quote will be sent back to your Sales Rep for review, and you will be notified again once the new quote is ready.













Request a Quote from the Checkout Page

Once you have added all of the items to their checkout you would like to be quoted on then you can follow the steps below:

1. Add Items to Checkout:

• Ensure all items you want to be quoted on are added to your checkout.

2. Request a Quote:

- Select "Request Quote for All Items" from either:
- The bottom of the cart summary dropdown.
- The shopping cart window (visible once you select "Checkout").

3. Request a Quote Page:

- You will be taken to the "Request a Quote" page. Here, you can:
- Verify the products you want to be quoted on.
- Add additional items to the quote.
- Create and organize products into groups.
- Add notes to individual products or the entire quote for your sales representative.
- Any step throughout the quote process you can send a message to your account manager. This feature can be found at the bottom of any created quote.

4. Finalize Your Quote:

 When you are satisfied with your quote, select "Submit Request" to finalize it.

5. Wait for Notification:

 Wait for an email notification that your Sales Rep has reviewed and provided a quote (you will also be notified when you login if your quote has been proposed).

6. Review the Quote:

- If you are satisfied with the quoted price, select "Order" to add the items to your cart
- If you decline the quote, provide notes explaining why. The quote will be sent back to your Sales Rep for review, and you will be notified again once the new quote is ready.

My Customer Quote



Purpose

My Customer Quotes is a tool that helps you create professionally branded (your branding) quotes for your customers and if your customer agrees to the quote, you can then purchase all of the items directly from the tool. The tool also helps you simplify margin calculations and other costs, and creates a quoted PDF document that you can send to your customer.

How to Access

- 1. Select your initials at the top right of the screen, to show your account drawer menu.
- 2. Select "My Customer Quotes".

Wire Project List / cm REQUEST QUOTE Updand or 72/0224 by Chris Sayert Next @	ADD LIST TO CART
PDF Display Settings	Schedule Reminder
Search Q, Search products is last Select All Products 🗉 Add Items To List Serting Choose Sert Type 🗸 💥 Print All QR Codes	Export 20 Delete
ROUGH-IN 🖌	GRAND TOTAL: \$385.98 🥆
Select All Products News to Choose a Group v Copy to Choose a Group v EDelete Group	ADD GROUP TO CART

+ - My Account - My Customer Quotes			
ly Customer	Quotes		
h Q. Search quotes by name	Sort by Last Updated V		
	A + My Account + My Cantemer Quester	a + My Account + My Customer Quotes Iy Customer Quotes a Q, Search cuotes by name Sen by Last bydated v	a - My Account - My Cubermer Quotes Iy Customer Quotes an Q. Search guotes by name Sert by Last tiplated v

Creating a My Customer Quote

- 1. From a Project List:
- Create a Project List (refer to page 11 for instructions).
- Select the three vertical dots next to your project list.
- Select "Create My Customer Quote".

2. Directly in My Customer Quotes:

- Access My Customer Quotes through the account drawer by selecting your initials and selecting My Customer Quotes.
- Select "New Quote".

My Customer Quote

(

PDF Display Setti	ngs			
My Logo		Freight Charges \$ 0.00	7	PDF Options Spec Sheets
My Website		Labour Charges		
My Email		S 0.00	8	Product Page Options Products in line item format
Email@Address.co	m	Itemized Pricing Package Tot	tal Pricing	Products on individual pages
3000-3000-30000		Quote Expiration Date		Submit .PDF to This Email Address Email@Address.com
Client Name Client's Name		Notes	×	
Client Street Address		Type a Note		
Address Line 1 Address Line 2				
Client City				
Client Province	Client Postal Code			
AB	✓ Postal Code			

Editing Your Customer Quote PDF

Once in My Customer Quote, you can customize it for your customer's project.

- 1. Edit quote name
- 2. Upload your company logo, enter your website URL, email, and phone number
- 3. Add client's name and address
- 4. Add freight or labor charges
- 5. Show pricing for each item, or just for the entire quote.
- 6. Your quote expiration date
- 7. Include spec sheets
- 8. Display products as line items or on individual pages
- 9. After editing, you can save or print it as a PDF.

Adding Items to a My Customer Quote:

- 1. One-by-One:
- Select "Add Item to Quote".
- Search for products by SKU, manufacturer part number, or a general description.
- · Select "Add to Quote".

2. Using an Upload:

- Use the Upload function to add items via an Excel or CSV file.
- To save you time, You can use the import functionality to add multiple products to the list at one time.
- In your Customer Quote select "Add Items To List"
- Select "Upload Items" to add multiple products at once.
- You can choose to download the template or create your own spreadsheet that includes the following fields: Product, Unit of Measure, and Qty Ordered. Fill in the details and then save the spreadsheet.
- Select "Choose File" to search for your file, then select it, and then select "Upload File".



My Customer Quote



Adding Margins:

- 1. Select "Calculate All Margins" to apply a percentage markup to all items in the quote.
- 2. To add markups individually, select "Calculate Markup" under each product's quote price.
- You can also input the price directly into the quote price field to add a margin by dollar value.

My Customer Quote - Name > ter		REQUEST Q		QUOTE TO CART
PDF Display Settings				`
Select All Products Sort by Choose So	rt Order 🗸 🗸	E CALC	ULATE ALL MARKUPS	💥 PRINT ALL QR CODES
				GRAND TOTAL: \$0.00 A
Select All Products Move to Choose a Group v Copy to Choose a Group	🗸 📋 Delete Group			ADD GROUP TO CART
PRODUCT DESCRIPTION	PRICE/UNIT	QTY	TOTAL	
SUPERFORM EPS16-1.5X4X8 TYPE II R6 FLAT PANEL INSULATION	\$49.35 / EA	- 1 +	\$0.00	ADD TO CART
III MRR Part #: EPS16-1.5X4X8 SR0/#: 1257256 III N STOCK IN STOCK	S /ea			
Actual Product Not Shaven Q. Add Related Product	Calculate Markup		56 Print QR Code	2 Line Notes
KIL QDL2031-8-3 DBL BOWL SS SINK 3-H	3395.18 / EA	- 1 +	\$0.00	ADD TO CART

Page Overview:

On this page, you can also:

- 1. Add all products or selected products to your cart.
- 2. Add line notes to each product.

Placing Orders

Finding Products

You can search for products by utilizing the search bar, accessing the Brands page, or selecting from the available options in the Product Categories drop-down menu.



After selecting the product, they can choose the desired quantity and select "Add To Cart" when satisfied. It is important to note that the you can adjust the quantity of the product in their cart even after it has been added.



Placing Order For Pick Up

To access the shopping cart page, you will need to select the cart icon located in the top right corner of the screen.





PRODUCTS		PRICE/UNIT	QTY	TOTAL
	Crimping Tool Klein 1005	\$47.50 / EA	- 1 +	\$47.50 🗊
	MFR Part #: 0394424 SKU #: ABC-123-XYZ			·
	17 IN STOCK 36 Available with increased lead time	🗷 Project List		🎤 Line Notes
	Branch, Editoroto Month. 180-472.2859	ContactUs AboutUs Locations	Careers 🔤 Showrakins	
	top bartile & gilbson Stop By Category - Baseds Coverlaads Quick Criser	Q Search	S 12	
	Home - Cart			
	Shopping Cart CONTRACT Shopping			

Once on the shopping cart page, you can review the items in your cart, adjust the quantity of each item using the provided field, add or remove items using the corresponding buttons, and even add notes or items to a list for future reordering.

To proceed with the checkout process, you can select the "Pick Up" option under the "Fulfillment Method" section, and then select the "Checkout" button.

Checkout - Shipping

1 Addresses	2 Payment	3 Review	CONTINUE	
Addresses			Order Summary	Edit Cart
			Subtotal	\$1.39
Billing Address Select Saved Address	Pick	Up Address	Shipping & Handling	\$0.00
A	Edmon	ton North	Tax	\$0.07
Apero Test #Aperotest 889234 Whyte Avenue Edmonton, AB TSJ 8H8	13475 Edmon CA	Fort Road ton, AB TSA 1C6	Eco Fees	\$0.00
604-468-0999 Fax: 604-941-9436 thomas.ritsert@xngage.com	780-47	2-2850	Total	\$1.46
Order Notes (optional) You can start typing here				

\$1.39/ EA _ 1 +

Afterward, you should verify your pick-up location, which will be displayed by default as your assigned branch. You should also verify the billing address, add any necessary order notes using the provided field, and then select "Continue" to proceed.

Checkout - Review & Submit

		Order Summary	Edit Car
		Subtotal	\$1.39
Purchase Order #		Shipping & Handling	\$0.00
Enter Purchase Order #		Tax	\$0.0
Contract #		Eco Fees	\$0.00
Enter Contract Order #		Total	\$1.4
Request Date			
mm/dd/yyyy	×		
Have a Promotion Code?			
Promotion Code	APPLY		
	Parchase Order # Enter Parchase Order # Contract # Enter Constract Order # Request Date mm //dd /yyyy Have a Promotion Code? Promotion Code?	Punchase Oxfer # Enter Punchase Oxfer # Centract # Enter Construct Oxfer # Request Date mm / dd yyyy X	Purchase Order # Subinitiant y Purchase Order # Subioteal Purchase Order # Subioteal Purchase Order # Tax Eco Frees Contract # Enter Contract Order # Total Request Date mm / dd yyyy X IIII Have a Pomotion Code? Ptomotion Code APPLY

At this point, you can choose your preferred payment method using the provided options. If paying by credit card, the you should enter the card details and have the option to save them for future orders. If you are an account customer, you can place the order on your account. Additionally, you can include your PO# or Contract# as necessary. Once everything is confirmed, you can select "Continue" to proceed.

Checkout - Review & Submit

✓ Addresses	✓ Shipping	Payment 4 Revie	w	PLACE ORDE	R
Addresses			₽ [*] Edit	Order Summary	Edit Cart
Billing Address Apero Test #Aperotest 899224 Whyte Avenue Edmonton, AB TBJ 8H8 CA 604-668 0999 Fax: 604-941 9436 thomas.ritsert@xngage.com		Shipping Address Change Fulfilment M Apero Test Advertisett 189323 Mylos Abouta Banonton, All T8J 8H8 CA 94-468-0999 Park 6:04-41-943 boumas.ntsettgungage.com	ethod to Pick Up →	Subtotal Shipping & Handling Tax Eco Fees Total	\$1.39 \$0.00 \$0.07 \$0.00 \$1.46
Shipping			₽ [®] Edit		
Shipping Carrier Local Delivery		Shipping Service Bartle & Gibson Truck (fees may	apply)		

Before submitting the order, you should review the order summary to ensure that all information is accurate. Once you confirmed that everything is correct, select "Place Order". After the order has been submitted, the branch will contact you once your order is ready for pick up.

Placing Order For Delivery

To access the shopping cart page, select the cart icon located in the top right corner of the screen.



To proceed with the checkout process, select the "Delivery" option under the "Fulfillment Method" section, and then select the "Checkout" button.

To proceed with the checkout process, verify your billing address*. Then select the delivery address by choosing either your billing address or adding a new delivery address. If necessary, you can also include any order notes using the provided field. Once everything is confirmed, select "Continue" to proceed with the checkout process.

*You must contact our credit department to update your billing address.

Choose a delivery carrier from the available options:

- Local Delivery (only available in some locations, charges may apply): Bartle & Gibson delivery trucks.
- My Own Carrier: enter your courier name & account number (you will need to include the carrier name and account number).

You can also add notes using the provided field and select whether to ship the entire order or a part of it. Once everything is confirmed, select "Continue" to proceed with the checkout process.



PRODUCTS		PRICE/UNIT	QTY	TOTAL
	Crimping Tool Klein 1005	\$47.50 / EA	- 1 +	\$47.50 🗎
	MFR Part #: 0394424 SKU #: ABC-123-XYZ			ʻ
	17 IN STOCK 36 Available with increased lead time	Project List		🎤 Line Notes

Shopping Cart Continue Shop



Checkout - Shipping

1 Addresses 2	Shipping	3 Payment	4 Review	CONTINUE	
Addresses				Order Summary	Edit Cart
Billing Address Select Saved Add	dress	Shipping Address Select S	Saved Address	Shipping & Handling Tax	\$0.00 \$0.07
Apero Test #Aperotest 889234 Whyte Avenue Edmonton, AB T8J 8H8		 Ship to One-Time Address Use Billing Address 		Eco Fees	\$0.00
CA 604-468-0999 Fax: 604-941-9436 thomas.ritsert@xngage.com		Apero Test #Aperotest 889234 Whyte Avenue Edmonton, AB T8J 8H8 CA		Total	\$1.46
Order Notes (optional)		604-468-0999 Fax: 604-941-9436 thomas.ritsert@xngage.com			
		A Order Contains Items Located In A	Iternate Warehouse Locations.		

Checkout - Review & Submit

Addresses	2 Shipping	3 Payment	4 Review	CONTINUE	
Shipping				Order Summary	Edit Cart
Shipping				Subtotal	\$1.39
			_	Shipping & Handling	\$0.00
Please note shipping chi	arges may apply to this order based on selec	ted carrier service below.		Tax	\$0.07
Select Carrier		Select Service		Eco Fees	\$0.00
Local Delivery	~	Bartle & Gibson Truck (fees may apply)	v	Total	\$1.46

Checkout - Review & Submit

Addresses	Shipping	3 Payment 4 Review		3 Payment 4 Review		CONTINUE	
Payment				Order Summary	Edit Cart		
rayment				Subtotal	\$1.39		
Payment Method *		Purchase Order #		Shipping & Handling	\$0.00		
Credit (On Account)	~	Enter Purchase Order #		Tax	\$0.07		
		Contract # Enter Contract Order #		Eco Fees	\$0.00		
		Request Date		Iotai	01.40		
		mm/dd/yyyy	× 📖				
		Have a Promotion Code?					
		Promotion Code	APPLY				

At this point, choose your preferred payment method using the provided options. If paying by credit card, enter the card details and you have the option to save them for future orders. If you are an account customer, you can place the order on your terms account. Additionally, you can include your PO# or Contract# as necessary. Once everything is confirmed, select "Continue" to proceed with the payment process.

Checkout - Review & Submit

✓ Addresses	✓ Shipping	V Payment	4 Review		PLACE ORDER	R
Addresses				₽ Edit	Order Summary	Edit Cart
Billing Address Apere Test #Apertest B0223 Mythy Avenue Biomoton, AR TM BB 80 CA 63-448 0991 Sol-448 0991 Fac. 664 4F 9456 Maxware (Branch Bang)		Shipping Address of Apera Test #Aperotest B89234 Whyte Avenue Edmonton, AB TSJ BHB CA 504-468-099 Fax: 504-941-9435 thomas:rtisert@xngage.com	Shipping Address Change Fulfilment Method to Pick Up → Apera Test Reported B92234 Wrigh Avenue B92234 Wrigh Avenue Common Avenue Common Avenue Common Avenue Common Avenue Common Avenue Common Avenue Common Avenue State Avenue Common Avenue Common Avenue Common Avenue State Avenue Common Avenue		Subtotal Shipping & Handling Tax Eco Fees Total	\$1.39 \$0.00 \$0.07 \$0.00 \$1.46
Shipping				∕ Edit		
Shipping Carrier Local Delivery		Shipping Service Bartle & Gib	son Truck (fees may apply)			

Before submitting the order, you should review the order summary to ensure that all information is accurate. Once confirmed that everything is correct, you can select "Place Order". After the order has been submitted, you will receive an email with the shipping information. Tracking info will only be provided by your carrier directly, wherever possible.



Using Quick Order

To access the quick order tool, select "Quick Order" from the top menu bar. Alternatively, you can select your account and then select "Hello [First Name}" to access your account information.



To add products to the quick order tool, you should begin by searching for the desired product, either by SKU, or manufacturer part number. Once the product is located, you should select the desired quantity and then select "Add to Order" to add the product to your order. This process can be repeated for each additional product that you wish to add.

Quick Order

After adding products to your order, you have the ability to adjust the quantities or remove products as needed.



If you need to add a large number of items, you can use a spreadsheet to upload an order. Once the selection is finalized, you can add the Quick Order products to a Project List or select "Add All to Cart & Checkout" to proceed with the order.

earch			QTY					Order Summary	
		~		1 +				Total	\$637.78
								ADD ALL TO CART &	СНЕСК ОИТ
PRODUCTS				PRICE/UNIT	QTY	TOTAL		Upload Order	Add to List
	elta© Elta T2767-BL ARA 3 H LACK	DLE ROMAN TUB T	RIM	\$637.78/ EA	1 +	\$637.78	Î		
Me ME	FR Part #: T2767-8L	SKU #: 1224927							













Ball Valves



How-To Use the Search Bar Tool

To quickly find a specific product on our web store, utilize our Global Search Tool located in the top header. You can search using various criteria including:

- Bartle & Gibson SKU
 - Product Name
- Manufacturer Part
 Number

Trade Slang

- Brand Name
- General Description

How-To Search by Category

Use the "Shop by Category" feature located in the top header to browse products by category.

- 1. Navigate to Shop by Category: On the main menu, select "Shop by Category".
- 2. Explore Categories: You will see a list of product categories.
- 3. Select a Category: Select the category that best matches your search.

How-To Search by Brand

To find products by brand, use our "Brands" feature:

- 1. Select Brands: On the main menu, select "Brands".
- Search for a Brand: Browse or search for the brand you are looking for.
- **3. Explore Brand Products:** Once inside a brand, you can search for your product by the categories that brand carries or by viewing all their products.

How-To Use Search Filters

After performing a search, you can further refine your results on the product list page:

 Use Filters: Once a search is performed, use the filters on the left-hand side to narrow down your search. You can filter by brand, price range, specifications, and more, making it easier to find the exact product you need.