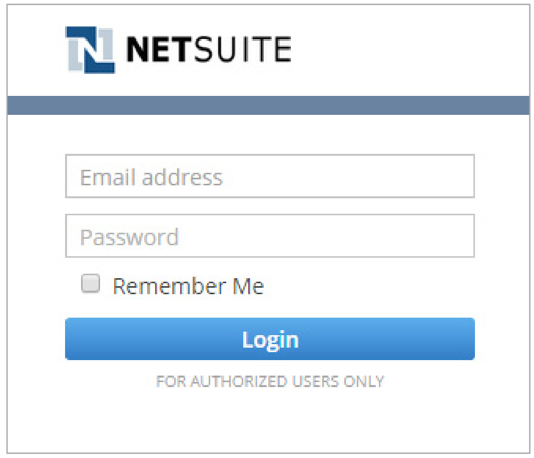
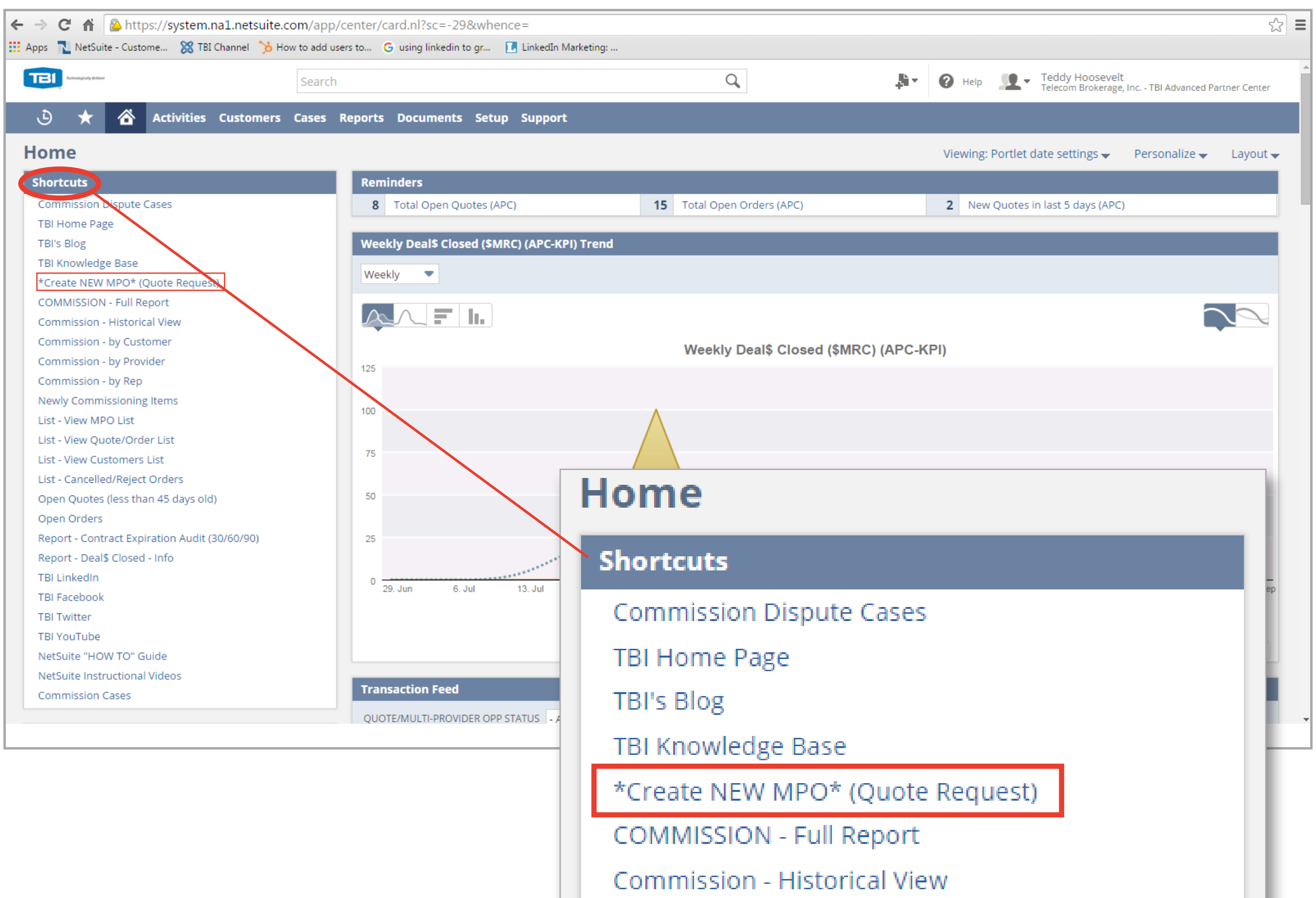
How to Submit a Quote in NetSuite

1. Log into NetSuite [(netsuite.com)](netsuite.com)

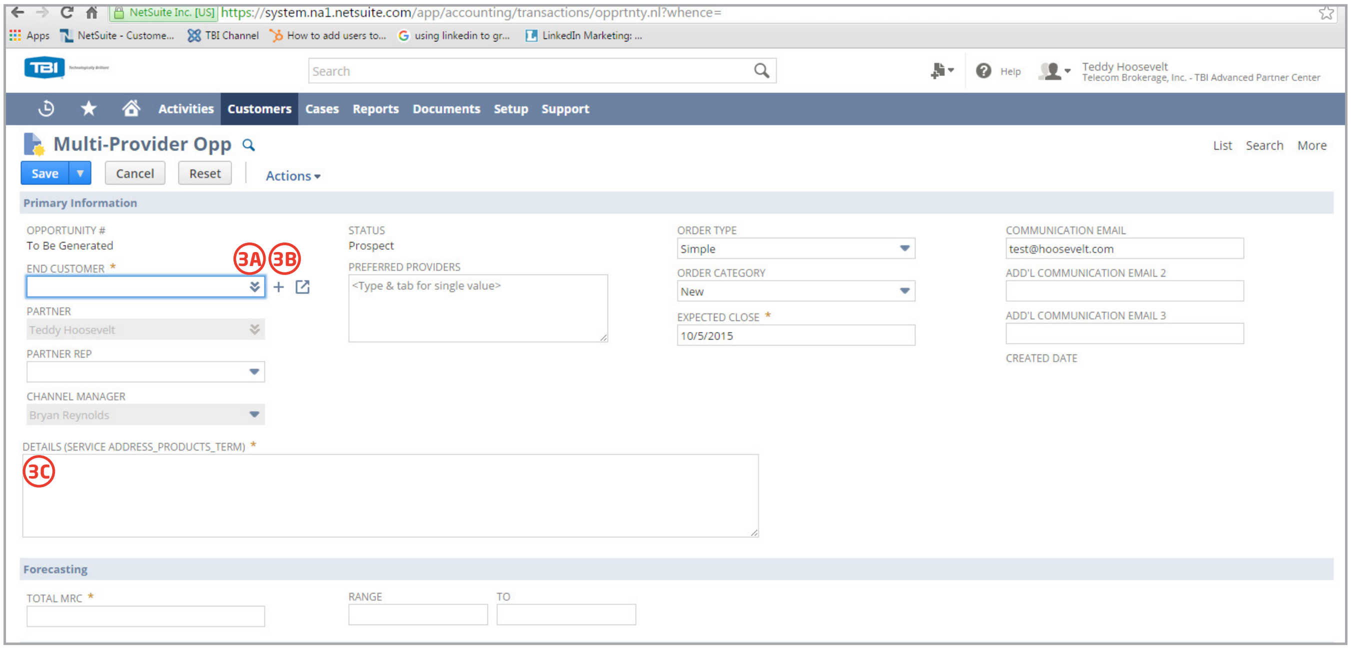
Password resets for NetSuite can go to helpdesk@tbicom.com



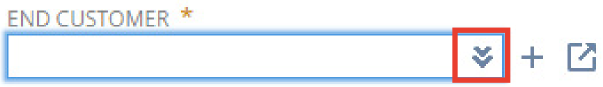
2. On your Dashboard (home screen), from the Shortcuts box, CLICK " *CREATE NEW MPO* (Quote Request)"



3. Start entering information into the two required fields "End Customer" and "Details"

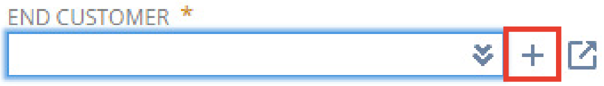


A. Existing customers, appear under the "List" option – accessed from the 2 downward arrows on the right side of the "End Customer" box – you can also begin typing their name and NetSuite will fill it out when you press the tab key.



B. If a new customer, HOVER to the right of "End Customer" box and CLICK "+" icon that appears

1. You can also edit customer information from this step by clicking the "pop out" icon to the right of the "+" – a new window opens to edit information

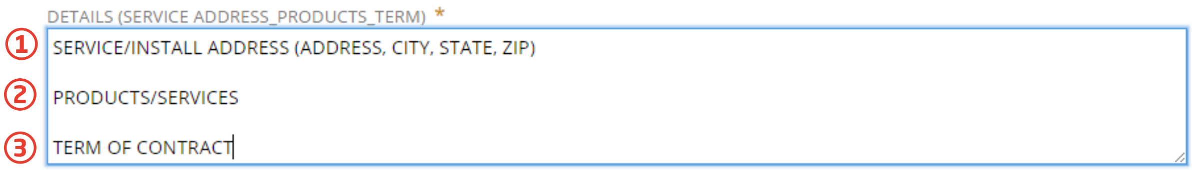


C. In the **Details** box, enter the product details – WHERE, WHAT, and HOW LONG

1. WHERE – Service/Install Address (address, city, state, zip)

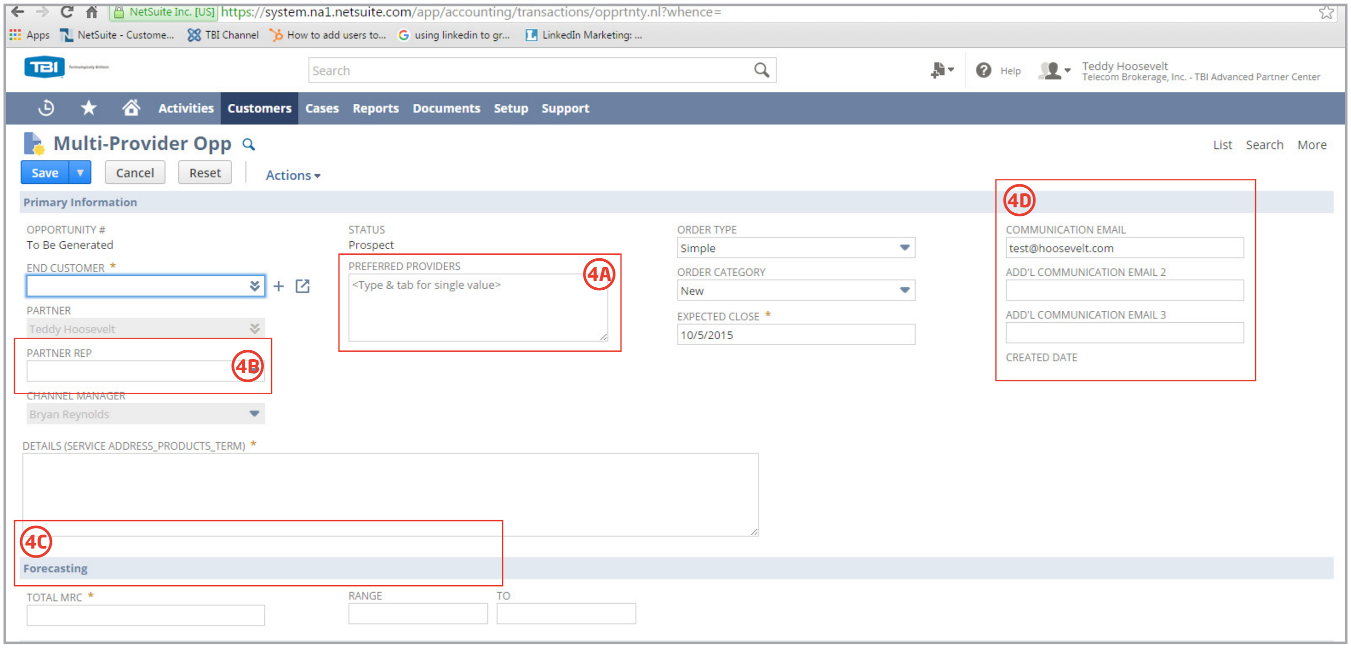
2. WHAT – Products/Services requested (Be specific)

3. HOW LONG – Term of Contract Length (TBI's default is 36 months, if not specified)



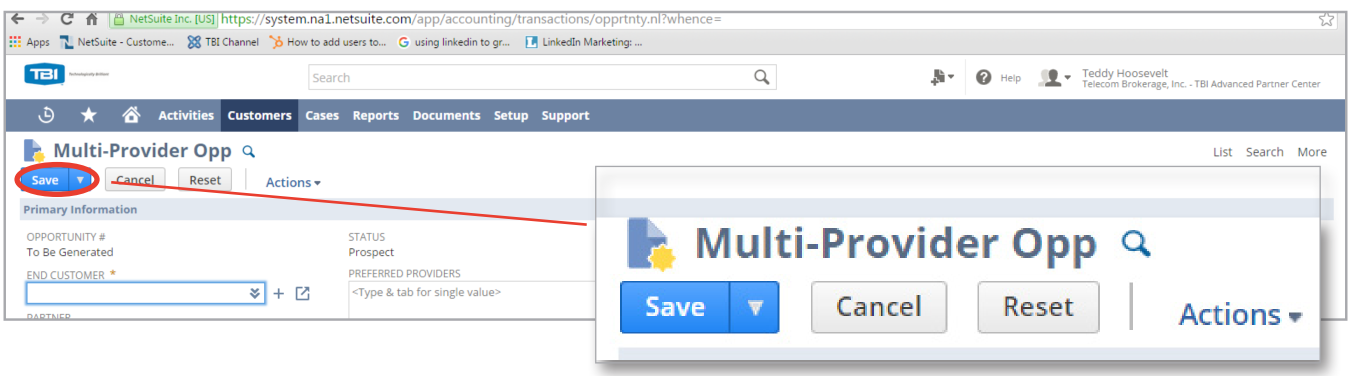
4. Optional Information to include:

A. Preferred Providers (Type in Provider name or use double down arrows for full multiselect list)
B. Partner Rep – Used to tag individuals to the opportunity
C. Forecasting – Total MRC (monthly recurring charge) and Range for quotes
D. Communication Email – Enter up to 3 email addresses of the people who wish to receive notifications (your organization's primary e-mail will default)



5. CLICK "Save"

- MPOs entered through NetSuite are assigned to a Specialist up to 2 business hours of receipt
- Opportunity number is generated for your reference, see Step 6



6. View the MPO number

- Opportunity number is listed first and can then be referenced on your Dashboard under the "Transaction Feed".
- "In Progress" is the status of the MPO, stating that TBI is now in the process of generating quotes.
- For more information about the next steps, please reference the NetSuite HOW TO Guide, located in your "Shortcuts" box of NetSuite.