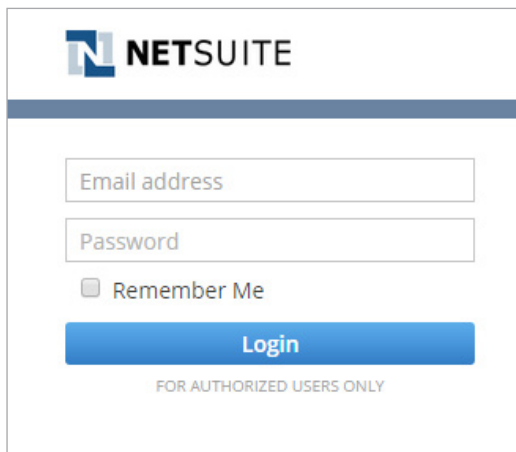


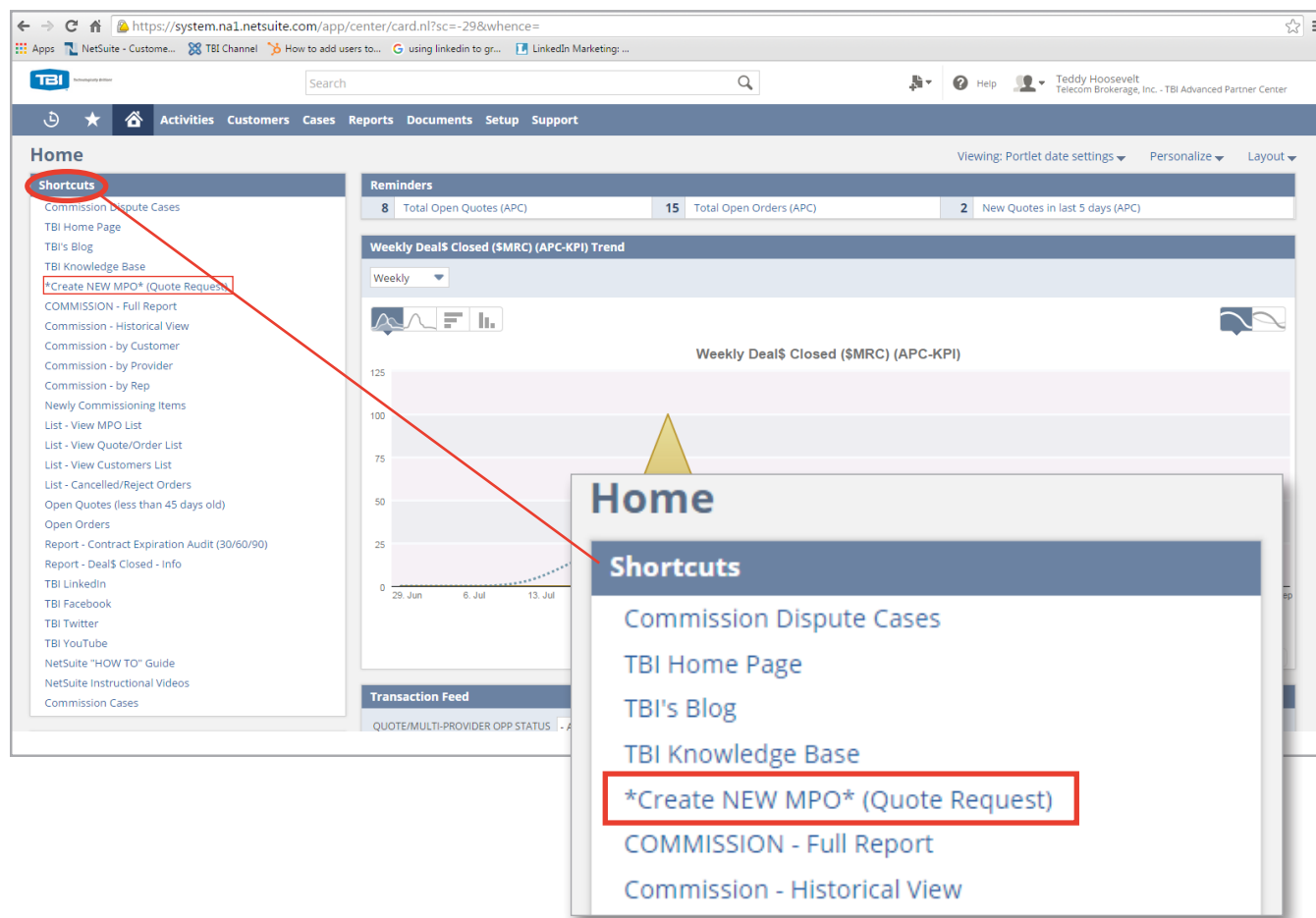
How to Submit a Quote in NetSuite

1. Log into NetSuite (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)

The screenshot shows the NetSuite 'Multi-Provider Opp' form. Callouts are placed on the following fields:

- 4A:** Points to the 'PREFERRED PROVIDERS' field, which contains the placeholder text '<Type & tab for single value>'. A red box highlights this field.
- 4B:** Points to the 'PARTNER REP' dropdown menu, which currently shows 'Teddy Hoosvelt'. A red box highlights this field.
- 4C:** Points to the 'Forecasting' section, which includes 'TOTAL MRC *', 'RANGE', and 'TO' input fields. A red box highlights this section.
- 4D:** Points to the 'COMMUNICATION EMAIL' field, which contains 'test@hoosvelt.com'. A red box highlights this field and the subsequent 'ADD'L COMMUNICATION EMAIL 2' and 'ADD'L COMMUNICATION EMAIL 3' fields.

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

The screenshot shows the NetSuite 'Multi-Provider Opp' form. A red circle highlights the 'Save' button in the top left corner of the form. A red arrow points from the 'Save' button to a callout box that shows a larger view of the 'Save' button and the 'Cancel', 'Reset', and 'Actions' buttons.

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.

The callout box shows a 'Multi-Provider Opp' card with the following details:

- Opportunity Number:** 22697
- Name:** Shemp Howard
- Status:** IN PROGRESS
- Buttons:** Edit, Back, and Actions.