



## THE TTS CONNECTION

Welcome to the February issue of the TTS Connection. We would like to share the story of a solution created for a manufacturer that became a great case study and was featured in Electrical Trends.

### [Digitally Transforming the Rep Service Model](#)

It's no surprise that manufacturers and distributors use Electronic Data Interchange (EDI) to automate their administrative functions like invoicing, order acknowledgment and shipping notices. It eliminates errors, removes cost from the supply chain and results in better customer service. Working with Tradetech Solutions, IDEA Exchange developed a modernized and affordable EDI Solution with Siemens for use with manufacturer's representatives.

Here's how TTS, IDEA and Siemens worked together to overcome the challenges with the current rep service model to develop a new industry solution.

[>> Full Article here](#)

**ELECTRICAL :: TRENDS**  
Information to learn, grow and profit

## Module Update

### **The Projects Tab**

Thanks to continued feedback from our customers, our system continues to improve and grow. The next time you log in to the TTS Platform, visit the Project Tab and you will notice the following new fields:

- **Project Manager (we default to your login credentials, but you can change to another company user)**
- **Project Value**
- **Created Date**
- **Bid Date**
- **Project Companies (in addition to Architect, Engineer, GC and SC, you can now add Other (companies) and Vendors to the project)**

Once you create the New project, you can now pull contacts in from your TTS Contact databases address book.

**Project**

- Add Contact
- Attach Quote
- Change Name
- Create Quote
- Delete Project
- Email
- Save
- View Project Status

View Project Status: All

**Project Review**

Project Name: AA Test Project Project Manager: Sally Jones

City: Boston State: MA Project Value: \$165,465.00

Status: Budgeting Created Date: 01/17/2021

Type: Industrial Bid Date: 01/25/2021

Description: This is a high rise bldg - 28 stories

Notes: Initial project ceoms from our Dodge Reports

**Project Companies/Contacts** Hide

Architect: ABC Contracting - Schuete MA CITY LIGHTS - CANTON, MA Add Remove

Engineers: EZ PROJECT MANAGEMENT LLC - ROCKAWAY, NJ Add Remove

General Contractor: Test Company - Schuete, MA Add Remove

Sub Contractor: AAATest - CAPSTONE - MILLVILLE, MA CAPSTONE - MILLVILLE, MA Add Remove

Other: Add Remove

Vendor: Aluminum Wire Company Copper Wire Manufacturer MC Cable Manufacturer Add Remove

Contacts for Project						
	Company	City	First Name	Last Name	Email	Title
<span>Remove</span>	AAATest		Eric	McCombs	eric.mccombs@winkle.com	Outside Sales
<span>Remove</span>	AAATest		George	Bulick	george.bulick@winkle.com	Sales Manager
<span>Remove</span>	AAATest		Neale	Booth	neale.booth@winkle.com	Outside Sales
<span>Remove</span>	AAATest		Nick	Shirilla	nicholas.shirilla@winkle.com	Outside Sales
<span>Remove</span>	AAATest		Ted	Martin	ted.martin@winkle.com	Outside Sales
<span>Remove</span>	AAATest		Wade	Rensner	wade.rensner@winkle.com	Inside Sales (Quotations)
<span>Remove</span>	CITY LIGHTS	CANTON	Brian	Riemenschneider	briemenschneider@pepco.net	Hi Voltage

**Attached Quotations**

<span>Remove</span>	Quote Name	Customer	Total	Notes	Status	Vendor	Q.Date	Contractor
Attached Files								

**click to expand \***

Click here for a full visual breakdown of this  
<https://www.tradetechsolutions.com/pdf/NewTTSPROjects.pdf>

## Not Your Typical Project Management

### Why Stop at the Quotation?

Most CRMS have a project management feature, but they stop at the quotation. TTS can manage it all the way through to the purchase order.

***TTS Projects help you organize/manage:***

- **Work with Architect / Engineers to get your products specified**
- **Keep knowledge of the contractor companies who will do the purchasing**
- **Work with contractors to formulate what works best for them with your product offering**
- **Manage all the quotation activity through distribution**
- **Use the “Quote to Order” tool in the TTS Platform to create and order in the Total Order Entry module and electronically send an EDI order to your manufacturers**
- **The process that allows you to manage the complete project until you get your commission!**

## MS Outlook Add-in Enhancement

### One Click Quote Follow-Up

When in Outlook, use the TTS add-in feature to see a 6-month view of “Your (the logged in user) Quotes” or all of the “Branch



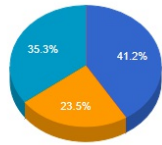
Viewing Activity for  
matthew@tradetechsolutions.com

[View All Branch Quotes](#)

1-15 [Send Follow-Up Email](#)  
Max 15 quotes per email

**Quote Status (Last 6 Months)**

- Won - 14
- Lost - 0
- Buy - 8
- Open - 0
- Bid - 0
- Closed - 12
- No Info - 0



**Active Quotations** (click on Quote Name for Internal Notes)

<b>CEMI Sample (Q-17609)</b>	Buy Aluminum Wire Company \$5,698.00
<b>Delviro (Q-17556)</b>	Buy Aluminum Wire Company \$0.00
<b>Factory (Q-17600)</b>	Buy Aluminum Wire Company \$100.00
<b>LaGrand Sample (Q-17633)</b>	Buy LeGrand \$4,440.00
<b>one source sample factory (Q-17525)</b>	Buy Aluminum Wire Company \$2,500.00
<b>Sample (Q-17611)</b>	Buy Aluminum Wire Company \$6,270.11
<b>Sample Advanced (Q-17668)</b>	Buy Aluminum Wire Company \$24,152.28
<b>Sample Col (Q-17620)</b>	Buy Aluminum Wire Company \$41,470.95
<b>Sample MS Quote (Q-17642)</b>	Buy Aluminum Wire Company \$1,801.38

**Comments from CRM**

He has been in the industry for 23 years. His dog is named Rusty. He likes

[click to expand \\*](#)

Quotes". Quote statuses are displayed in an easy-to-read pie chart, with a list of active quotations featured below.

**Here comes the best part!**

Click on any quote to view the internal notes  
Then click on the "Send Follow Up email" button

Up pops a pre-populated email formatted to your customer with the quote status, comment boxes and check boxes that they can easily fill out to communicate whether the quote is:

- **Still pending**
- **Did not get the order**
- **Placed with another vendor**

It's very easy to get the response you need and saves you the time from manually looking up all the outstanding quotes and drafting up the email the email. TTS is all about saving time and automating repetitive, time consuming tasks.

To: matthew@tradetechsolutions.com

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Subject: Quotation Follow Up Request

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Dear Matthew,

Thank you for the opportunity to quote. We would like to help you in bringing these quotes to orders. In order for us to remain focused on the current opportunities could you please give us an update on the below?

Quote Name	Comments
<b>CEMI Sample (Q-17609)</b> Status Vendor Value Buy Aluminum Wire Company \$5,698.00	<input type="checkbox"/> Still pending <input type="checkbox"/> Did not get order <input type="checkbox"/> Placed order with another vendor
<b>Delviro (Q-17556)</b> Status Vendor Value Buy Aluminum Wire Company \$0.00	<input type="checkbox"/> Still pending <input type="checkbox"/> Did not get order <input type="checkbox"/> Placed order with another vendor
<b>Factory (Q-17600)</b> Status Vendor Value Buy Aluminum Wire Company \$100.00	<input type="checkbox"/> Still pending <input type="checkbox"/> Did not get order <input type="checkbox"/> Placed order with another vendor
<b>LaGrand Sample (Q-17633)</b> Status Vendor Value Buy LeGrand \$4,440.00	<input type="checkbox"/> Still pending <input type="checkbox"/> Did not get order <input type="checkbox"/> Placed order with another vendor
<b>one source sample factory (Q-17525)</b> Status Vendor Value Buy Aluminum Wire Company \$2,500.00	<input type="checkbox"/> Still pending <input type="checkbox"/> Did not get order <input type="checkbox"/> Placed order with another vendor
<b>Sample (Q-17611)</b> Status Vendor Value Buy Aluminum Wire Company \$6,270.11	<input type="checkbox"/> Still pending <input type="checkbox"/> Did not get order <input type="checkbox"/> Placed order with another vendor
<b>Sample Advanced (Q-17668)</b> Status Vendor Value Buy Aluminum Wire Company \$24,152.28	<input type="checkbox"/> Still pending <input type="checkbox"/> Did not get order <input type="checkbox"/> Placed order with another vendor
<b>Sample Col (Q-17620)</b> Status Vendor Value Buy Aluminum Wire Company \$41,470.95	<input type="checkbox"/> Still pending <input type="checkbox"/> Did not get order <input type="checkbox"/> Placed order with another vendor

[click to expand \\*](#)

>> [Click here for step by step breakdown of this feature.](#)



## Did You Know?

TTS is partnered with [www.switch.com/](http://www.switch.com/) for our Data Solution Center - same as Ebay, AWS, Intel, Citrix and many other Fortune 500 companies - <https://www.switch.com/clients/>.

Know that your data is always backed up and secure.

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*TradeTech Solutions is proud to be the technology service provider for **NEMRA.***

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## GET IN TOUCH

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