Microsoft Outlook
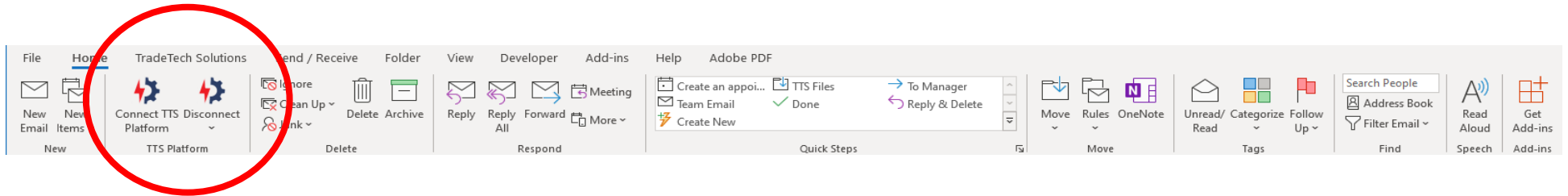# TTS Platform Addin Instructions

1) You will need to login to take advantage of the TTS Platform Addin
   a. Your login credentials will be saved with your local copy of Microsoft Outlook. Therefore, you will not need to login on each use.

2) You will see a 'Side Panel" open asking for your TTS Platform credentials

TTS Platform

UserName [   ]

Password [   ]

Login TTS Platform

This Outlook AddIn requires an user account from TTS Platform. This AddIn will give TTS Platform users the ability to view quotation activity based on selecting an email within their Outlook program. This will also connect to TTS Platform contacts allowing the user to create emails from their companies TTS Platform contacts.
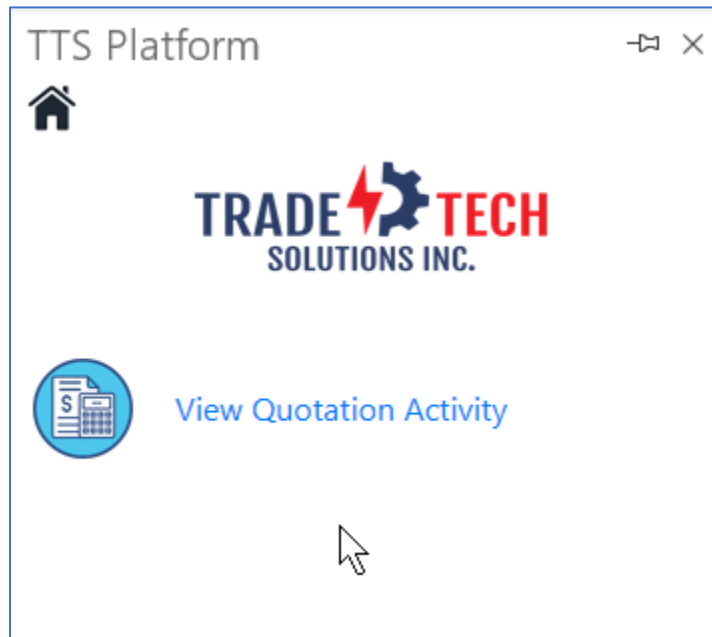Please contact us to sign up today.   Contact Us

3) The next screen will be the TTS Platform menu options
   a. Select "View Quotation Activity"
      i. *More options will be added in the future*
   b. We recommend that you select on the "stick pin" to lock this screen
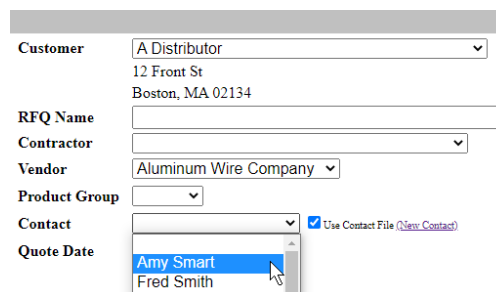   i. This will help avoid the need to keep selecting "Connect TTS Platform" from the Home tab

4) Based on viewing an email you will see the Quotation Activity of the "From" email address.
   a. **IMPORTANT:** this feature is based on using your company contacts in the TTS Quotations
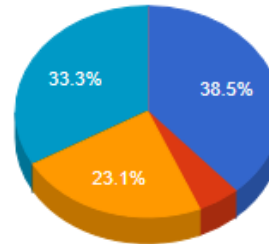   i. During creating or editing a quotation you have the option to "Use Contact File"

TRADE TECH SOLUTIONS INC.

Quote Status (Last 6 Months)

- Won - 15
- Lost - 2
- Buy - 9
- Open - 0
- Bid - 0
- Closed - 13
- No Info - 0

Pie chart: 38.5%, 33.3%, 23.1%

Active Quotations (click on Quote Name for Internal Notes)

CEMI Sample (Q-17605)		
Buy	B BBBB Man	$5,623.00
CEMI Sample (Q-17609)		
Buy	Aluminum Wire Company	$5,698.00
CF - Dublin Road Water Plant Standby Power Project (Q-17456)		
Buy	Manufacturer H	$2,308.78
Delviro (Q-17556)		
Buy	Aluminum Wire Company	$0.00
Factory (Q-17600)		
Buy	Aluminum Wire Company	$100.00
LaGrand Sample (Q-17633)		
Buy	LeGrand	$4,440.00
one source sample factory (Q-17525)		
Buy	Aluminum Wire Company	$2,500.00
Sample (Q-17611)		
Buy	Aluminum Wire Company	$6,270.11
Sample Col (Q-17620)		
Buy	Aluminum Wire Company	$41,470.95
Sample MS Quote (Q-17642)		
Buy	Aluminum Wire Company	$1,801.38

Comments from CRM

He has been in the industry for 32 years. His dog is named Rusty. He likes Dunkin Donuts and Florida

5) To view the Internal Notes of a specific quotation, click on the quote name
   a. From this screen you can
      i. Add internal notes
      ii. Update quote status
      iii. Change status for All

TTS Platform - https://tradetechsolutions.com/OutLookAddIn/OutlookAddInInternalNotes2.asp?TTSSessionDatabase=arep&strID=17633&strFirstName=Freddy W&strStatus=Buy   ✕

Status Buy   Buy   Open   Bid   Won   Lost   Closed   No Info

Internal Quotation Notes for: LaGrand Sample (Q-17633)

11/30/2020 (Freddy W)
10/26/2020 (Freddy W) These are Internal Notes ONLY for Rep Company to view

Save   Cancel

Save/Change Status for All

6) Other features the TTS Platform Addin gives you is the ability to use your companies TTS Contacts to create emails by one of these methods
   a. Individuals Emails
   b. Email List
   c. Company Types
7) Simply create a "New Email" and your will see the TTS Platform icon on the ribbon.
   a. Select 'Get TTS Contacts' and a "Side Panel" will expose the connection to your companies TTS Contacts
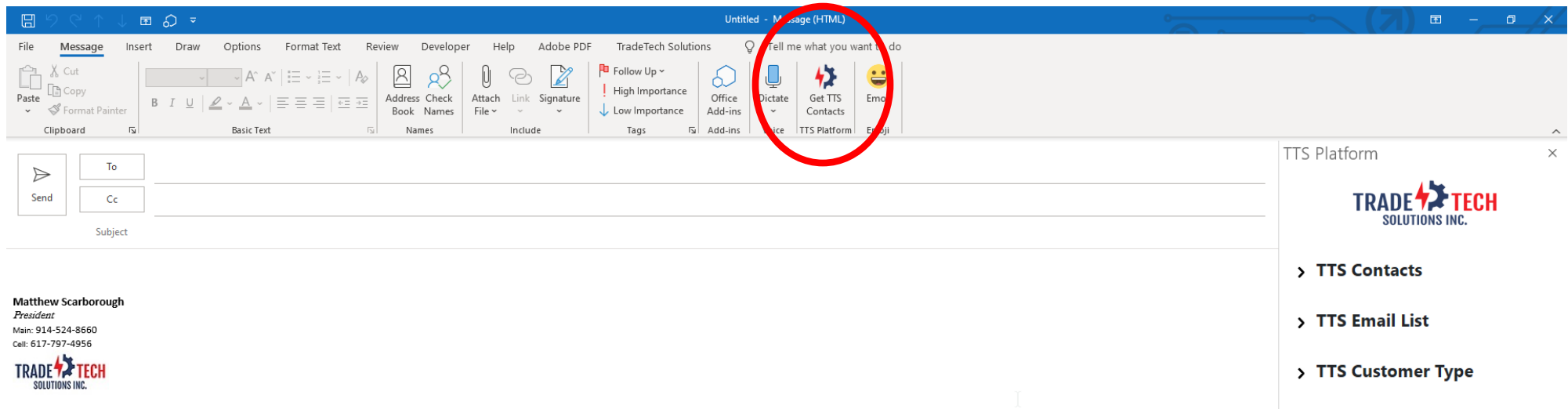
8) From the "Side Panel" select TTS Contacts
   a. Enter the first name to search for contacts
   b. Then select "Add To:", "Add CC" or "Add BCC"
   c. Select "Clear Content" to reset the list
9) From the "Side Panel" select "TTS Email List"
   a. Enter the email list from TTS Email lists
      i. You can add 50 contacts at a time (up to 500)
10) From the "Side Panel" select "TTS Customer Type"
   a. Enter the customer type from TTS Customer Types
      i. You can add 50 contacts at a time (up to 500)

TRADE TECH SOLUTIONS INC.

⌄ **TTS Contacts**

Enter First Name of TTS Contact

to

Todd Bercaw (todd.bercaw@graybar.com)
todd berry (abc@123.com)
Todd Bruce (tbruce@edgesgroup.com)
Todd Front (todd@adistributor.com)
Todd Heinrichs (todd.heinrichs@rexelusa.com)

Add To:

Add Cc:

Add Bcc:

Clear Content

› **TTS Email List**

› **TTS Customer Type**

TRADE TECH SOLUTIONS INC.

› **TTS Contacts**

⌄ **TTS Email List**

Enter Email List

S   ✕

Sample Email LIst
Stabiloy Price Increase
SW Price Increase

Starting adding at #   1

Add To:

Add Cc:

Add Bcc:

Clear Content

› **TTS Customer Type**

TRADE TECH SOLUTIONS INC.

› **TTS Contacts**

› **TTS Email List**

⌄ **TTS Customer Type**

Enter Customer Type

e   ✕

Electrical Contractor
End User
Engineer

Starting adding at #   1

Add To: (1-50)

Add Cc: (1-50)

Add Bcc: (1-50)

Clear Content