



VITAL COAT®

SHINGLE SHIELD MAX™

Quote / PO Request Instructions

Important

A quote/PO request is a review workflow. It is not the same as submitting a paid order. All orders over \$10,000.00 require a PO submitted.

Quote / PO Request Workflow

Step	Action	What Happens
1	Build Cart	Select products and quantities.
2	Request Quote	Use the Request a Quote option in the cart.
3	Review	Vital Coat® reviews the submitted request.
4	Approval	If approved, the order can be processed.
5	Invoice	Vital Coat® sends the invoice according to the workflow.

1. What a Quote / PO Request Is

A quote/PO request allows an Authorized Installer to submit a cart for review before invoice processing. It is used when an order needs approval, quote handling, or purchase order processing.

Submitting a request does not automatically mean the order has been processed.

- A quote/PO request is different from paying by credit card, ACH, or approved invoice payment.
- The request is reviewed before an order is processed.
- Installers should wait for confirmation or follow-up after submission.

2. When to Use This Option

Use the quote/PO request workflow when direct payment is not the correct path or when the order requires approval before invoice processing.

- Use it when a purchase order is required.
- Use it when an order needs review or approval before invoice processing.
- Use it when instructed by Vital Coat® support.
- Do not use it for duplicate orders or casual price checks unless instructed.



3. Build Your Cart First

Before requesting a quote, build the cart exactly as the order should be reviewed.

- Select the correct Shingle Shield MAX™ product.
- Confirm package size, product description, and quantity.
- Review the cart carefully before submitting the request.
- Remove any incorrect items before continuing.

4. Locate the Request a Quote Option

In the cart, locate the small Request a Quote option near the lower left area. This option may appear below the cart table or near the cart action area.

- Confirm you are logged into the correct account if the option is not visible.
- Confirm you are using the correct cart and product category.
- Contact Vital Coat® support if the option still does not appear.

5. Complete Required Information

The request should include accurate company, contact, account, shipping, and purchase order information where requested.

- Provide company name and contact name.
- Provide the account email connected to the Authorized Installer account.
- Confirm shipping information.
- Add a PO number if available.
- Include any special notes or instructions.

6. Submit the Quote / PO Request

Review the request before submitting. Submit only once unless Vital Coat® support instructs otherwise.

- Wait for confirmation or follow-up.
- Do not assume the order is active until the request is reviewed and approved.
- Keep a copy of any confirmation for your records.

7. What Happens After Submission

After submission, Vital Coat® reviews the request. If approved, Vital Coat® will process the order and send an invoice according to the approved workflow.

- Vital Coat® may contact the installer if additional information is needed.
- Orders are handled according to account status, product availability, and program requirements.
- Invoice timing may depend on review status and account details.

8. Common Mistakes to Avoid

Most quote/PO request problems can be avoided by reviewing the cart, account, and submitted information before sending the request.



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- Submitting the wrong product or quantity.
 - Using the wrong account.
 - Leaving out company or shipping information.
 - Submitting more than once because confirmation is delayed.
 - Assuming a quote request is the same as a paid order.
 - Posting private PO or billing details in the Member Portal.

9. What to Do If You Need Help

Use the right support path if the quote option is missing, the request appears unclear, or follow-up is needed.

- Review the Order Portal Course for cart and checkout guidance.
- Check the Resource Library for updated instructions.
- Contact Vital Coat® support for quote, PO, invoice, or account-specific questions.
- Include your company name, account email, requested products, and a short description of the issue.

10. Key Takeaways

- A quote/PO request is a review workflow.
- Build and review the cart before requesting a quote.
- Use the small Request a Quote option in the cart.
- Submit the request only once unless instructed.
- If approved, Vital Coat® will process the order and send an invoice.
- Contact Vital Coat® support if the quote option is missing or unclear.