How to make the best use of your 30 day trial

Making good use of your 30 day trial is best approached as follows:

To further explore if RepQuotes.com is for you, start out by creating a simple quote from a quote you created in the past. Create it again in RepQuotes.com, which will produce a finished quote document ready for presentation to a prospect or a principle.

Navigation: Upon logging into RepQuotes you will see the main menu across the top of the screen. The tabs are blue except for the tab you are actively in, which is red. Each tab has a submenu that appears in red in the space immediately below the main menu.

For starters:

- **Edit your profile** - From your registration information, RepQuotes will draw your company name and sales person information and put that on the proposal letter and quote document.
    1. To edit your information and to add phone and fax numbers, log in to RepQuotes and choose MyRepQuotes in the main menu. Click on Update your Profile and begin editing.
    2. To create a new user (another salesperson in your organization), click on Manage Users, then click Create User and enter the new user profile information.
- Add your logo to give your test quote a professional, finished quality.
    1. Choose MyRepQuotes in the main menu. Click on Logo, which will prompt you to browse to where you keep your logo file. Currently .jpg, .gif and some .png formats are supported. A logo is highly recommended to give your documents a finished, professional look. If you don't have a logo, we can assist you in creating one.

Then add enough data to create your quote:

- **Add Category** - Categories exist in RepQuotes.com to give you a logical place to group and organize your products. For purposes of your trial period, create one or two categories and title them by manufacturer. These will be your "Catalogs" (we use the terms Catalog and Category interchangeably). The order of things is to (1) create your catalog/category, (2) create your items (3) assign the newly created items to a catalog/category.

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1. Choose Parts in the main menu. In the submenu click on Add Category. Enter the Category name. We suggest you either use the manufacturer's name or a product category. As you add Parts, you will assign them to a Category.
2. Sub-Categories allow you to further classify your products. If you use the manufacturer name for your Categories, you could use a product line name for your Sub-Catagories. Add Sub-Categories to your Categories by clicking on Edit to the left of your newly created Category name. Click Add Sub-Category. Choose the Main Category from the drop down list if multiple categories exist. Enter the Sub-Category name in the field and click on Add Category. This provides an organized structure for all of your parts.

- **Add Parts** - Add just a few representative parts to your catalog.

1. Choose Parts in the main menu. In the submenu click on Add Parts. Enter the Part Name; there is a limit of 20 characters (recommend you use the manufacturer's Part Number). Add the Part Description. Add the Detailed Description. The Revision number is optional and does not appear on your Quotes. Enter Unit of Measure (EA, DOZ, GROSS, etc.). Enter the standard price of the item. Note that you will be able to edit the price during the Quote creation process as well. Entering the Cost is optional and for informational purposes only and will not appear on your quotes. Click Add Part when completed. This information can be edited as needed.
2. Build on the Category/Sub-Category work you just completed by adding the item to a category by clicking on Parts in the main menu and Get Catalog in the sub-menu. Click on View Parts in the Category or Sub-Category to which you want to assign Parts. This action presents all of yours Parts on the left side of the screen. From this list, move parts to the Category/Sub-Category by clicking on >>>>> under the "Add" column for the item. Click Done when finished.
3. Advanced: Price Books create different pricing rules, such as quantity discounts, for your products. You first create the Price Book, add Parts to the Price Book and create the quantity and price breaks. That Price Book is then assignable to a specific customer or even to an individual quote. Remember, you can also edit pricing on the fly as you create your quote.

- Add enough customer information to get the quote started, i.e. contact, company name and address.

1. Choose Customer Accounts in the main menu. Click on Create a New Account. Put the customer's name in the Account Name field. Leave the Account User as "Myself" (this field is

not visible if you are the only User set up in your RepQuotes system). Conditions can be entered here if specific conditions for this customer exist (as in "terms and conditions"). These will appear on that specific customer's Quotes. External notes are notes that will appear on customer Quotes at the end of the document. Internal notes do not appear on Quotes. SIC code is optional and allows you to classify your customers.

2. Step 2 takes you to the Address screen where you add the Main, Billing and Shipping addresses for the customer. Note that Multiple Shipping Addresses can be added. Click Save then Continue when complete. You must add an address or the quote report will be blank.
3. Step 3 takes you to the Add new Contacts screen where you create contacts for the account. Enter the appropriate information and when complete, click on the Save and Continue button, which takes you to the Quote and Order History screen. Click on Create a New Quote to get started then click on the Contact name of the account for whom you want to create a Quote. This takes you to the Enter Information screen.

Now create your Quote:

- Enter Quote Information - The Enter Information screen is where you enter the general information for your quote:

1. Description – Use any appropriate description for the quote. There is a 41 character limit.
2. Delivery Date – Enter the proposed delivery date
3. Order Status – Use the drop down menu to choose Active or Inactive
4. Revision – Optional. This is for your internal use as you prepare updated versions of the quote. It is informational only.
5. Expiration Date – Optional. This is the quote expiration date and will appear on your quote document.
6. Price Book – Optional. Assign the quote to one of your Price Books if appropriate.
7. Discount – Optional. Enter an overall percentage discount for the quote if appropriate.
8. External Notes – Optional. This is where you would enter notes directed to your customer that you want to appear on the quote document and is the body of your Proposal Letter.
9. Internal Notes – Optional. Enter internal notes regarding the quote here.
10. Click Save to go to the Details screen for quote. This is where you enter your items.

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- Adding Details for your quote:

    1. Near the bottom of the screen in the Add Items section, click on Browse Product Catalog. On the left side of the screen a list of your product catalogs are shown. Select the appropriate category for the item you want from the product catalog. The catalog with all its items will appear. Enter the quantity for the item(s) and click Add. This will return you to the Details for your quote screen. At this point you can continue to add lines to your quote or edit the existing line by clicking on the Edit Line icon which is just to the right of the line number. This takes you to the Modify Line Information screen and is where, for that specific item, you can change the:
        - Delivery Date
        - Quantity
        - Unit Price
        - Discount
        - Add External Notes for that specific line with text that is attached to that line and is viewable by your customer
        - Add Internal Notes for that specific line with text that is viewable only by your sales organization
        - Editing at such a detailed level is one of the powerful features of our RepQuotes as it allows you the flexibility to customize your quote down to the most granular level.
    2. Once you've added all of your lines, you can manage your quote status by clicking on the appropriate status in the Quote to Order Pipeline, which is at the top of the screen below the Quote description. As the quote advances through the approval process click on the appropriate status. This status remains with the quote and is visible in various screens including the View All Documents screen, which helps you keep track of the status of all of your quotes in one place.
    3. The quote can be further edited as necessary by clicking on the Edit buttons for the various components of the quote

- Printing your finished Quote - RepQuotes is designed to deliver a signature ready document for your prospects and customers:

    1. Click on View and Print Report just below the Quote description for a summary version of the quote.
    2. Click on View and Print Proposal for a signature ready proposal letter and quote document.