



InDepthRep

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This is a quick start guide for new users to complete the basic setup of the InDepthRep Program. It is not intended to replace the User's Manual. It is merely offered as a guide to follow after initial deployment to speed the process and highlight the areas that need to be addressed prior to full implementation of the InDepthRep Program.

1. Setup the Basics.

a. Setup Reference Files

i. List Type : Company

1. List Sub Type: Salesman

a. Enter the Salespeople for the Agency

2. List Sub Type: Territories

a. Enter the Geographic territories the Agency covers

3. List Sub Type: Types

a. Set the pricing level for each Company Type

ii. List Type: People

1. List Sub Type: Groups

a. Enter the name for each Group of Quote Recipients

iii. List Type: Price List

1. List Sub Type: Groups

a. Enter the name for each Group of Price List Items

iv. List Type: Quotes

1. List Sub Type: Architects

a. Enter the Company Types that will be displayed in the Architect field on the Quote Header

2. List Sub Type: Contractor

a. Enter the Company Types that will be displayed in the Contractor field on the Quote Header

3. List Sub Type: Engineers

a. Enter the Company Types that will be displayed in the Engineer field on the Quote Header

4. List Sub Type: Wholesaler

a. Enter the Company Types that will be displayed in the "Purchased By" field on the Quote Follow-Up Report

b. InDepth Defaults

i. Company Info Tab

1. Double check all Company address and telephone information.

2. Price Protection

a. Enter in the default statement to be used for quotes

3. Freight Terms

a. Enter in the default statement to be used for quotes

ii. Quote Header and Defaults Tab

1. Local Dialing
 - a. Select either 7 number or 10 number dialing for local fax numbers
 2. Quote Disclaimer
 - a. Enter in a disclaimer to be printed on the header of the first page of all quotes if desired.
 3. Default for Printing Quote Summary After Faxing Quotes
 - a. Select whether to print a quote summary to after every fax/email quote is sent
 4. Default for Sending Spreadsheets with Email Quotes
 - a. Select whether to send Product Line specific Spreadsheets with each email quote sent
 5. Print Qty on Scan Quotes
 - a. Select whether to print Quantities on all Scan Quotes sent
 6. Print Qty on Phone Quotes
 - a. Select whether to print Quantities on all Phone Quotes sent
- iii. Passwords
 1. Click the “Edit Passwords Button”
 2. Enter the default password of “indepth”
 3. Change all passwords to desired passwords
2. Enter Contact Information
 - a. Enter the Company information in the Company Module.
 - i. Main Tab
 1. Enter Company Name
 2. Enter Company Type
 3. Enter Company Phone/Fax/Toll Free numbers.
 4. Enter Address information
 5. Select Salesman from drop down list
 6. Select territory from drop down list
 7. Select Buying Group (if applicable) from drop down list
 8. Enter in Company Website address (if applicable)
 9. Product Lines
 - a. Click in the products line box and press any key
 - b. Select the desired product lines from the list on the left hand side.
 - i. Double Clicking on an individual product line will move that product line to the right hand side list
 - ii. Clicking on the double arrows will move all product lines either to or from the right hand list.
 - ii. People Tab
 1. Enter in the information for each person at the company
 - a. In order to send a quote to a company, there must be a person in this list
 - b. Enter Last Name
 - c. Enter First Name
 - d. Select Job Title from drop down list
 - e. Price Checkbox
 - i. This is a visual checkbox only.
 - f. Promo Checkbox

- i. This is a visual checkbox only
 - g. Quotes Checkbox
 - i. This box **MUST** be checked to send a quote to the person.
 - h. Product Lines
 - i. Click in the products line box and press any key
 - ii. Select the desired product lines from the list on the left hand side.
 - 1. Double Clicking on an individual product line will move that product line to the right hand side list
 - 2. Clicking on the double arrows will move all product lines either to or from the right hand list.
 - i. Email Address
 - i. Enter the email address for the person
 - j. Email Quotes Checkbox
 - i. Select this to send all quotes to this person via email
- iii. Address/Telephone Tab
 - 1. Enter in alternate Addresses and Telephone numbers for this Company
- b. People Module information
 - i. Most information will have already been entered in the Company Module
 - ii. Address/Telephone Tab
 - 1. Enter in alternate Addresses and Telephone numbers for this Person
- c. People Groups
 - i. Select the desired People Group from the drop down list or use the Find feature
 - 1. Click in the People table
 - 2. Type in the name of the desired addressee, last name first
 - 3. Continue until all addressee's are entered
 - ii. Continue until all groups are populated as desired
- d. Price List Information
 - i. Price List information can be hand entered or it can be purchased on a line by line basis from InDepthRep. All data can also be entered on an as needed basis.
- e. Price List Groups
 - i. Select the desired Price List Group from the drop down list or use the find feature
 - 1. Click in the Model number field
 - 2. Type in the model number of the item to be added to the group
 - 3. Continue until all items are added to the group

This will finish the Basic setup of the InDepthRep Program for use.

For basic operation of the InDepthRep Program, please refer to the User and Reference Manual.