PSREP USER GUIDE

1. Double click on the PSREP icon that was created on your desktop.

2. If this is a laptop, you may have 2 or more drives with data found on them. When you are out of the office and not connected to your network, you will need to select on the c:\ drive. If you are in the office or connected to your network, you will need to select on your server drive. If this is a desktop computer, PSREP will most likely default to your server drive and you will not have to select anything.

3. Select Tools → Rep Info Editor to change the company information on the left of the screen and your workstation information on the right of the screen. Each computer must have its own unique workstation ID number to ensure that quotes will not have the same numbers done by different people. Note that hitting enter after each entry in PSREP is a must and if not used this way will end up with undesired results.

4. Tools → Rep Info Editor also allows associate information to be included for each sales person.

    a. Pull down the arrow under Associates and select "Press Enter to Add New Associate". Hit enter when finished.

    b. Enter in a code for this associate such as a number or their initials. Hit enter when finished.

    c. Now enter in a Tracking Code/Name for this associate. This could be the name of the associate along with a certain territory that they cover. This allows the same person to have different tracking code names. If this does not apply, then just enter in the associate's name. Hit enter when finished.

    d. Now enter in the associates Name (this may be the same as the tracking code/name). Hit enter when finished.

    e. Now enter the associates e-mail address. Hit enter when finished.

    f. To add anther associate, select the drop down arrow again and start over with steps A thru E.

5. Select Quick Pricing → Create New to get a quick quote or to look up a specific price on a certain component. Note that you can print from quick pricing, but cannot save them.

    a. You can enter in a zip code at this time to calculate freight as you go. If you do not enter in a zip code first, it will prompt you for one. At that point you can select yes to enter one or no to go straight to entering part numbers.

    b. Enter in a quantity and hit enter.

i. At this point you can enter in a part number, hit enter to the see the information and then hit enter again to add the part to the list view or the large white area on the left side of the screen.

ii. You can also search for a component by entering in a "?" for the number and hitting enter. This will bring up a search dialog box that allows you to enter in a description and it will bring up all components with that description in it. For example, if you want to look up all slides, then type in "Slides", but if you wish to look for the Hurricane Slide, then you will need to type "Hurricane,slide" making sure that you have a comma between the two words. If you see the part that you want in the list, then double left click on the description to bring it into the quick pricing and then hit enter one more time to add it to the list view or the large white area on the left side of the screen.

c. You can also enter in a BOM file that you created in PSCAD (see step 28 in the PSCAD instructions). If you right click in the list view or large white area on the left side of the screen, it will give you the option to Import BOM File and browse to where you save the BOM file from PSCAD. It will normally default to the c:\pscad\bomfiles folder if you did not change the path. Select the BOM file and select OK to import into PSREP.

d. At this point you can enter in the following information:

i. If you had entered a zip code, you will see the calculated freight.

ii. Installation price

iii. Discount % or price

iv. CWO or Cash with Order discount (3%)

v. Tax Rate %

e. At the bottom you will see a total that is due. At this point you can print this out by selecting Quick Pricing → Print Preview. When the print preview comes up, then you can select the print button that will print to your default printer.

6. Select Quotes → Create New to create a formal quote. You will notice that this automatically created a quote number for you. Again this is based upon the workstation ID that we discussed in step 3 and is very important that each workstation has its own ID number.

a. Enter in all the information for the customer name, address, etc. Making sure to hit enter after each line. You can also have this customer's information saved for future quotes, but going to Tools → Customer Info Editor.

b. Follow the same instructions as Quick Pricing step 5 for entering in part numbers or inserting BOM files.

c. If you wish to show only one line item with a price for several components, select the first component in the list view and then hold the shift key down and select the last component that you wish to include. Once all components are highlighted, right click on the highlighted items and select Wrap as Rep Unit. This will prompt you for a description of the selected components and select OK. Then when you print it will show only one line item with the pricing and show the components as subcomponents of the one line item.

d. If you wish to show a discount, you can enter in a discount for all of the equipment or enter in a discount for each line item. Either way, the list price will still be shown and a discount amount will show at the bottom before the total amount.

e. If you wish to change the list price shown, such as the case of a Spring Sale Flyer unit, you can right click on the part number and select "Override Item Dealer/List". This will allow you to change the list and the sell price. The new price will show on the print out.

f. Notice that now when you select on a component, you have color options shown on the Colors tab. At this point, if you know colors you can select the pull down for each color option for that specific component. If you leave it as is, then when you print the quote, you can show spaces or lines that can be filled out later with the customer.

g. On the Notes tab, this is notes that are for the rep only and will not print on the quote.

h. On the Comments tab, this is comments that are for the customer and will print on the quote.

i. On the Terms tab, you can have additional terms that will print on the quote. You can have terms for this one quote or you can add a terms that you can access for future quotes under Tools → Terms Editor.

j. The Summary tab looks exactly like the Quick Pricing and you can add all the same info in step 5d.

k. At this point you can go to Quotes → Print Preview. You will be prompted for some quote printing options. You can change any of these settings to get the desired quote print out that you are looking for.

l. After you save this quote and get out of it, you have several other options. You can go to Quotes → Open Existing if you know the quote number that you are looking up or you can go to Quotes → Lookup that allows you to lookup a quote(s) based upon different criteria.

7. Select Orders → Create New to create an order.

    a. You will be prompted first to enter in an order number. This is your order number or PO number that you will provide to us. After you enter in the order number hit enter to continue. You will be prompted that this point that a new order number has been entered and select Yes to continue. If there has already been an order created as this number it will prompt you that this order number already exists and to enter in another number.

    b. At the Age Designation Dialog Box, select the age group that this order is for. Please remember that your order will be checked by this age when it is submitted.

    c. At the Consumer/Market Category Selector, please select the type of customer that you are selling to and select close and continue.

    d. At this point if you have already created a previous quote, you can import that by entering in the PSREP Quote # and hitting enter. This will bring over all the information that was in the quote.

    e. If you are starting this order from scratch, then you can enter in the customer information at the top. There is an area for the Bill To, Ship To, End User and Owner's Manual. These addresses could all be different, the same or a combination. If some of the addresses are the same, you can use the first letter of each of the tab names to bring over the previous information (i.e. If you have typed in the Bill To information and this is the same as the Ship To information, simply enter in "BT" in the name field and hit enter.

    f. On the Customer & Order Info tab, you will need to select a consumer code for your customer type that shows if this customer is tax exempt or not. (i.e. codes 1 thru 41 are non-taxable and the same type of customer for taxable is 51 thru 91). Select the Consumer Code pull down and select the code. If this is a non taxable customer, please also enter in the tax exempt number.

    g. Consumer/Market Category is the same as the information that you entered in step C. If you need to change this for any reason, please type in a "?" and you will be prompted with the dialog box selection again.

    h. Please select if this is a Turnkey job or not.

    i. Enter in the Customer P.O. number.

    j. Enter in the Project Name.

    k. Select the County pull down and select the county that you are selling to.

l. Select the Associate pull down and select the appropriate associate responsible for this sale.

m. At the bottom, again you can enter in the part numbers the same as steps 5B & C.

n. At this point you are required to enter in the colors for each component on the Colors tab. Please highlight the first component and select the color(s) at the bottom. Repeat this for each line item. Notice that if you have entered in that specific color option already, it will go ahead and fill that in for you on the all of the next components. At this point you can leave them the same color or you can change them individually to have different colors (i.e. have one slide a different color from the other one).

o. On the Discounts and Promos tab, if you select Bill to Rep in the very top right corner of the program, then you will see your bill to rep discount calculated for you. You can also put in special promos, such as the Spring Flyer, as well as if you receive a special quote from the Sales Dept.

p. On the Freight tab, if you have Bill to Rep selected it will default to Added. If this is an order that Park Structures will bill the customer, then it will default to predetermined.

q. On the taxes tab, if your tax table is up to date, it will pull the correct taxes for the city, county and or state. You can override or enter in this information at this point. You can also update this information for future use in Tools → Tax Master Editor.

r. On the Summary tab, you will see all of the information that has been calculated and you can enter in more information like installation, additional charges & deposits.

s. On the Notes to Order Entry tab, you can type in any information that you wish to pass along to the Order Entry Dept.

t. On the Notes to Engineering tab, you can type in any information that you wish to pass along to the Engineering Dept. Note that this is the place where the age designator will be placed that you selected in step B.

u. On the Rep Notes tab, this is the area where you can make yourself notes that will not print out on the order form.

v. At this point you are ready to print. Go to Order → Print Preview and then you can print this order.

w. You can also export this order and send it in to the Sales Dept. by going to Orders → Save as File. This will save this order as an ORD file. You can then e-mail this to the Sales Dept. or anyone else that has PSREP and they can then go to Orders → Create from File and open that order.

x. If this order was saved on a server then anyone in that office can go to Orders → Lookup and open that order by searching by any of the criteria listed. Or you can open the order directly if you know the order number by going to Order → Open Existing.