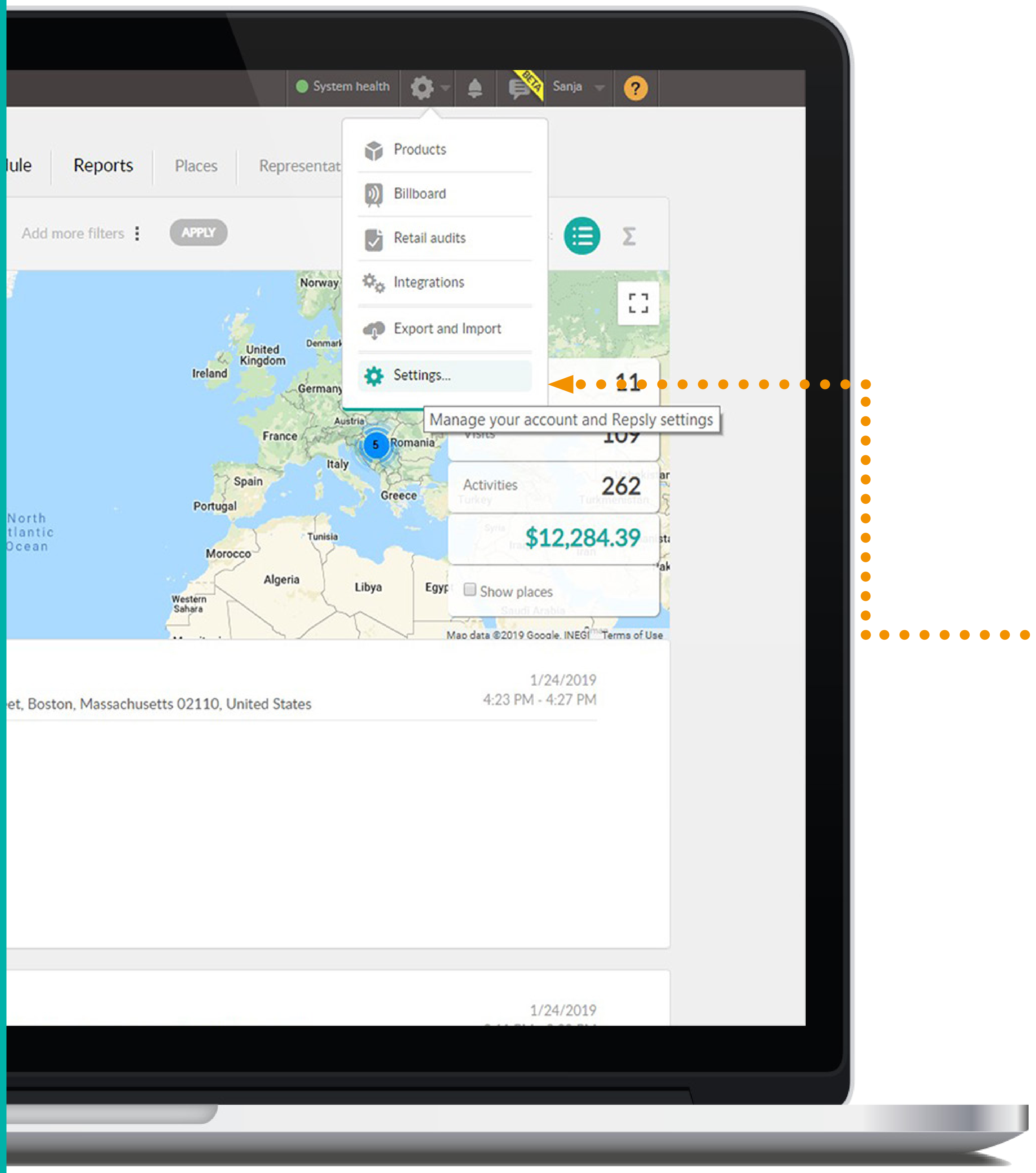
BACKOFFICE MANAGER TRAINING GUIDE

WEB APP



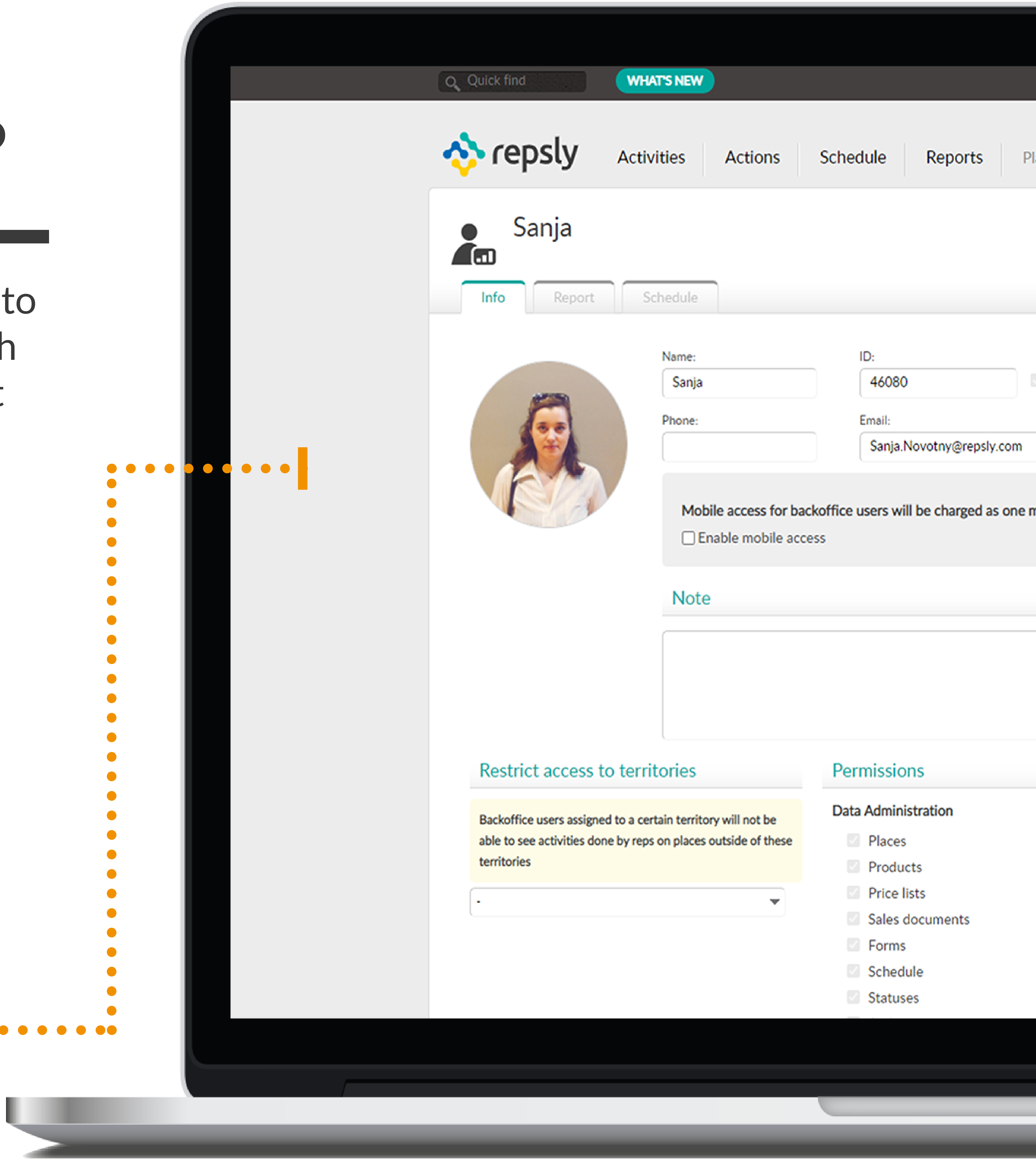
HOW TO ADD A NEW BACKOFFICE MANAGER?

Completing these steps will create an email that we'll send to the new back office user. This email will contain a link which will allow the new user to create a password in order to get into the back office and have complete access.

1 Click on the **Gear icon** and select **Settings**.

2 Click on the **Backoffice users** and select **New User**.

3 Fill in the necessary data. **Save** the new user.

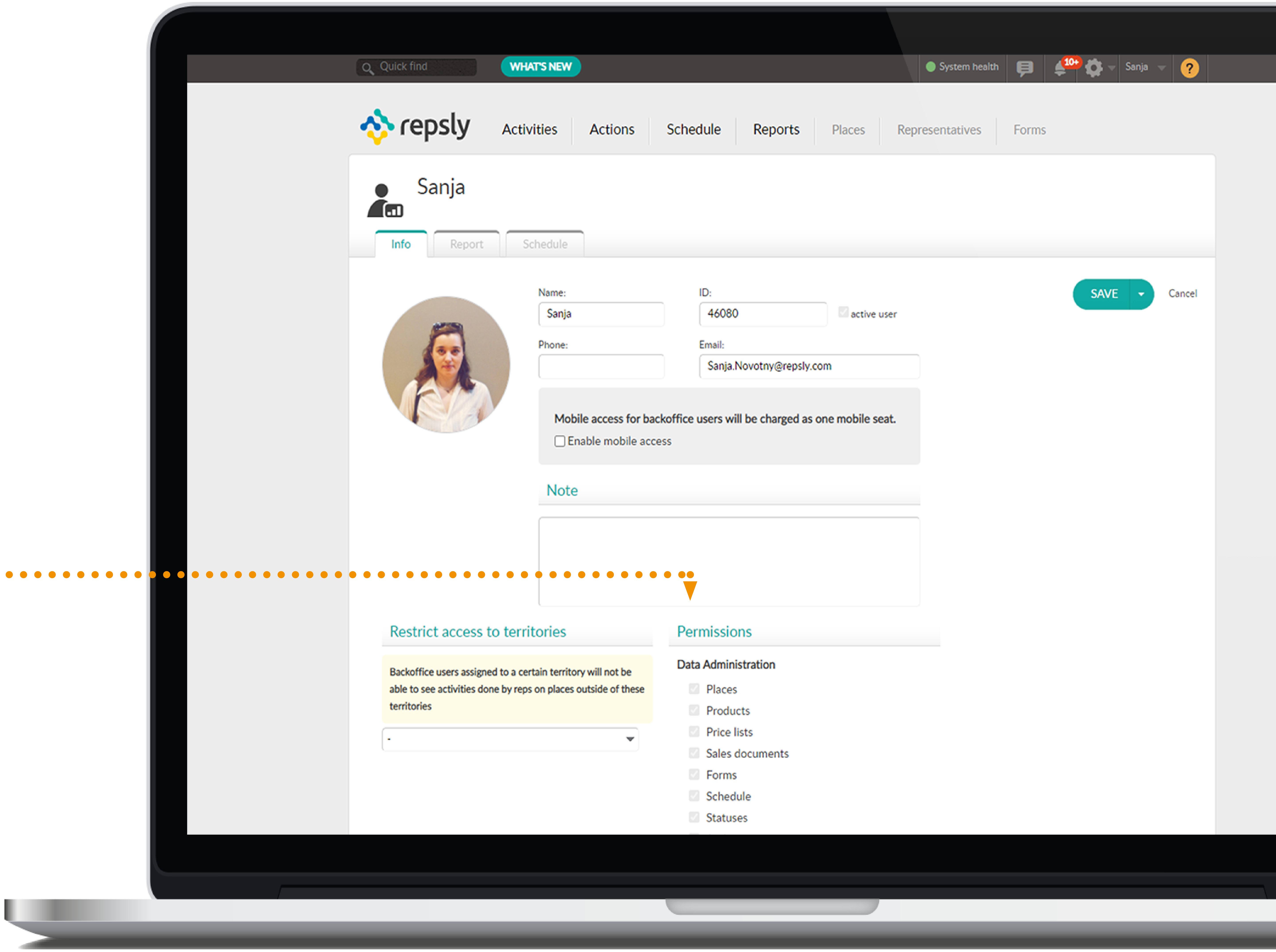


HOW TO LIMIT BACKOFFICE USERS TO CERTAIN FUNCTIONS?

1. Click on the Gear Icon and select Settings.

2. Click on Backoffice users and select the Backoffice user that you wish to create limited access for.

3. Take a look at the Permissions and check or uncheck what you want other managers to have access to.
Permission types include; Data Administration, Data Analysis and Manage Organization).
Click Save to update information.

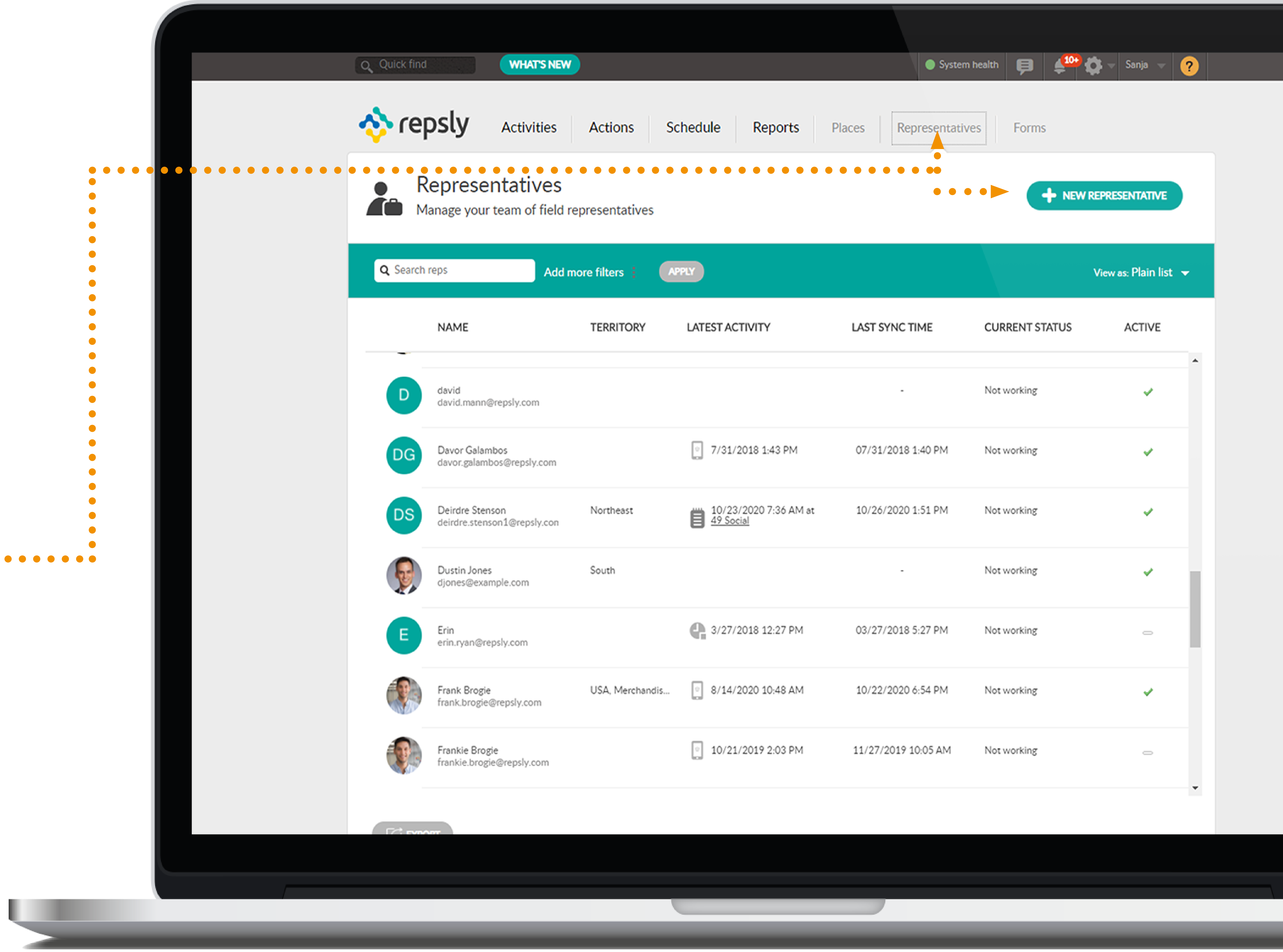


HOW TO ADD A NEW REPRESENTATIVE?

As your business grows you can add Reps on the fly. This will allow you to get new members of the team up and rolling as soon as possible.

Click the **Representatives tab** and select New Representative button.

1



Enter the Rep's contact information.

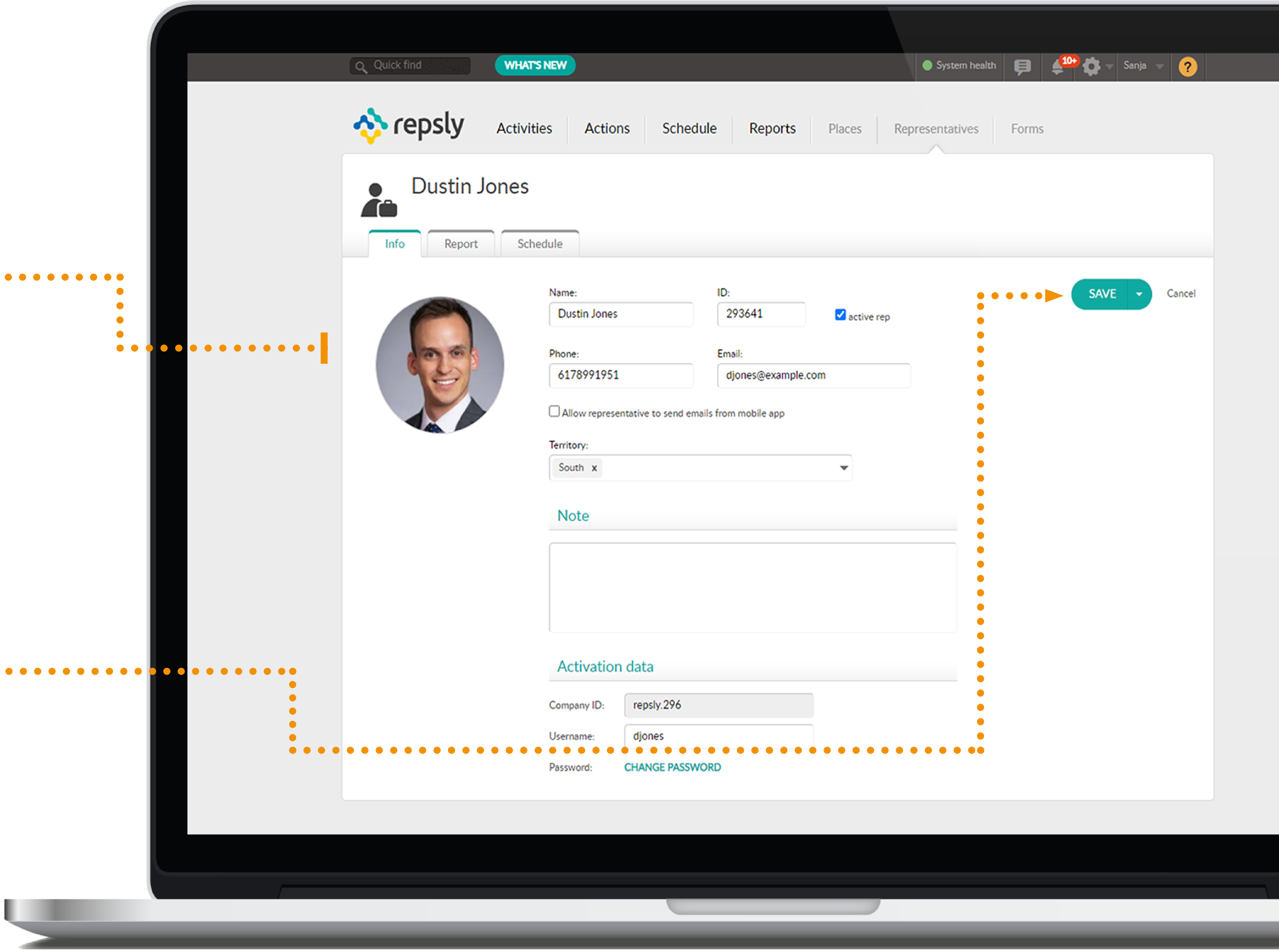
2

Activation data will allow them to access the mobile application.

3

Click **Save** to send the Rep an email prompting them to download the app to their mobile device and providing them with all of their Activation Data so they can log in.

4



HOW TO CHANGE THE LANGUAGE ON THE WEB APP?

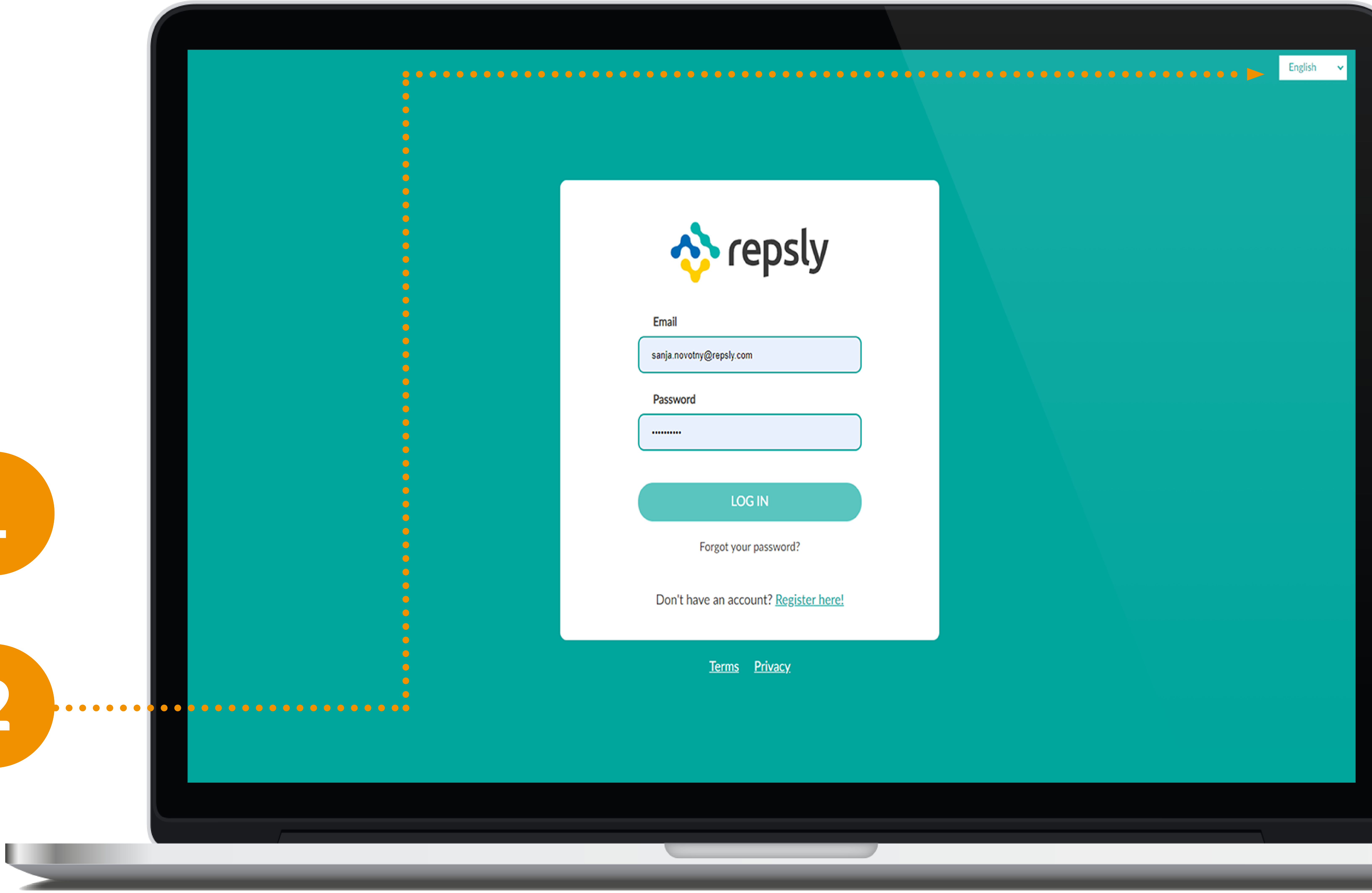
The Backoffice user has the capability to change the Web app's default language. This allows Backoffice Managers to see all features of the Web app in a specific language.

1

In order to change the language on the Backoffice, please log out of the Web app.

2

When you attempt to log back in, you will notice a language drop-down menu under the Repsly logo. Choose the language you want to use the Web app in. When you log back in, Repsly will be in selected language.

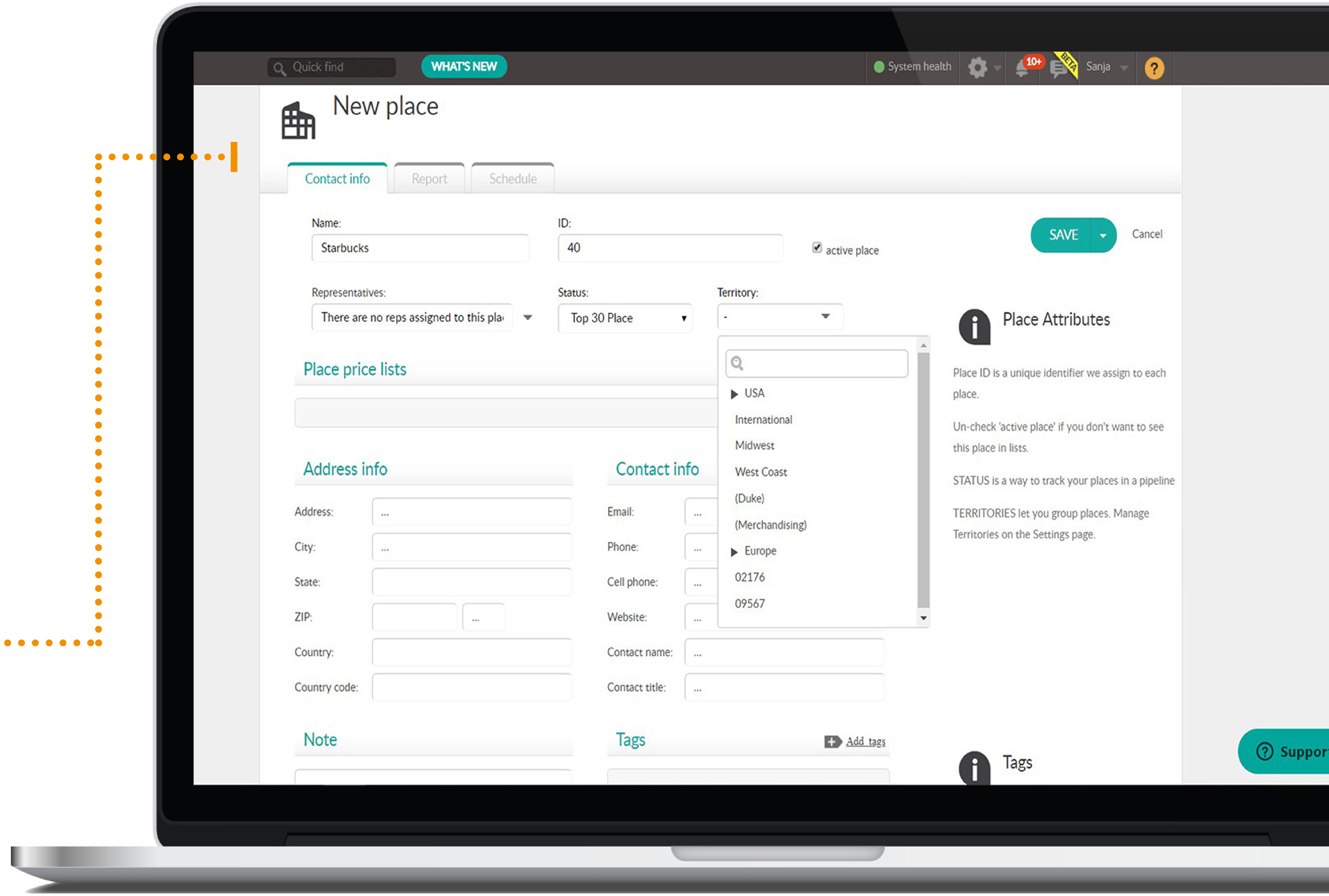


HOW TO ENTER A NEW PLACE?

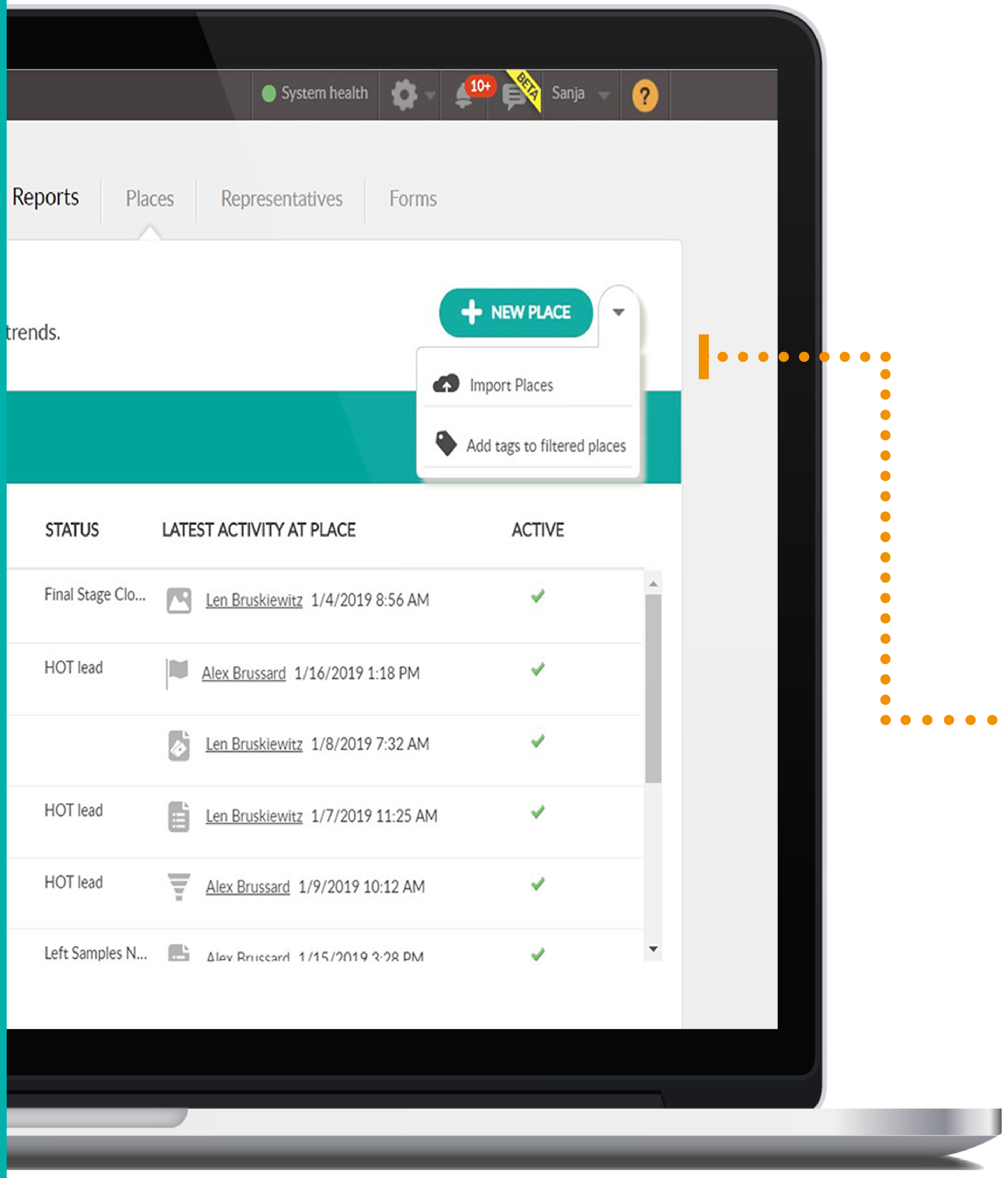
1. Select **Places tab** and click the **New Place** button.

2. Fill out all the required data - name and address.
   Note: Place's unique code will be generated automatically, but you can change it if needed.

3. Fill out any other desired data about your place - email, phone, cell, website etc.
   Make sure the active place box is checked. If this is not checked then the Place will not appear on place list. Click **Save**.

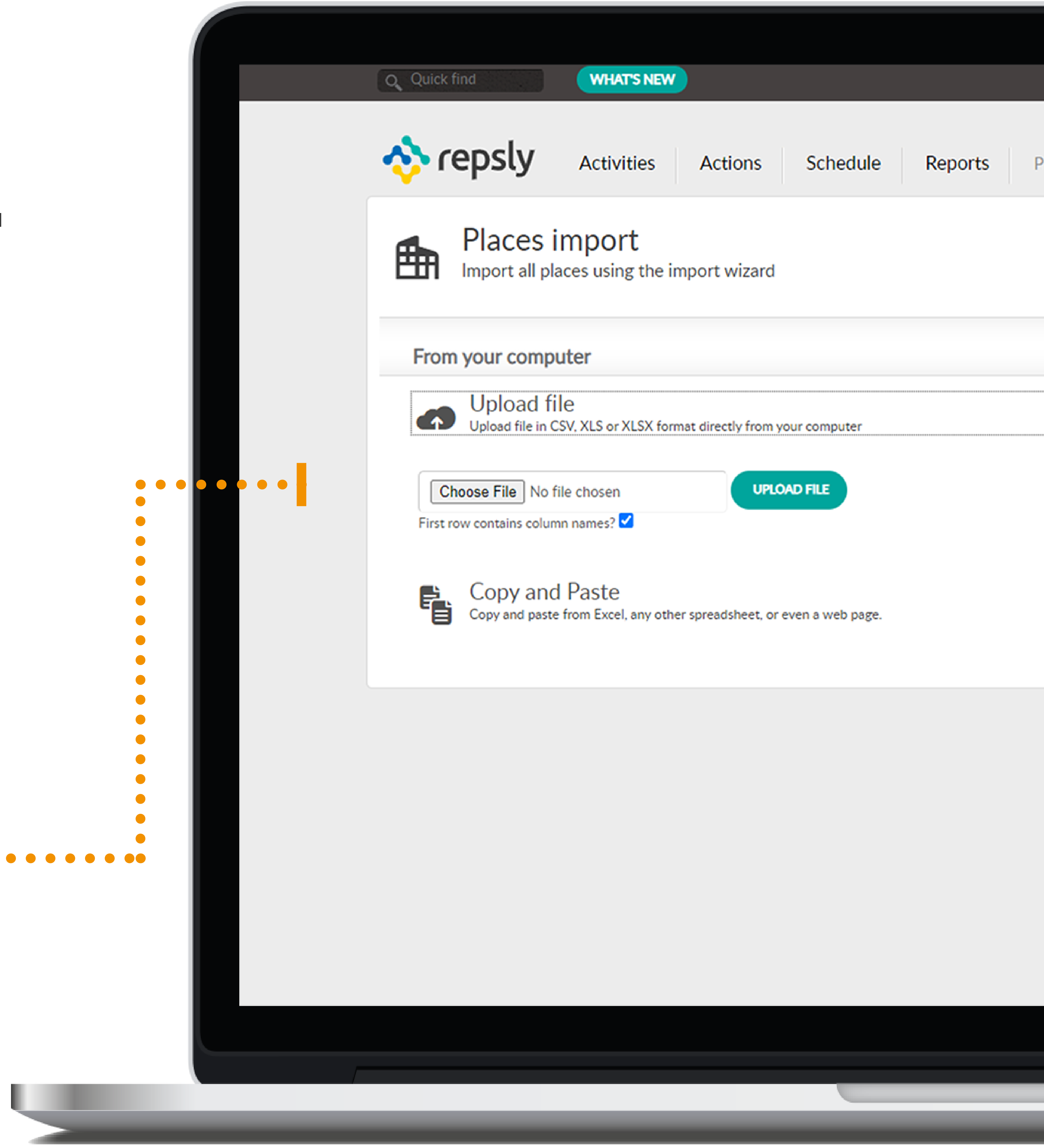


HOW TO IMPORT PLACE LISTS INTO REPSLY?



You can import place lists, by either importing an excel file or by the copy and paste method into the back office. This allows you to edit larger quantities of data in bulk.
To get a template for upload you can go to the Places tab and export the Excel file from that page.

1. Select Places tab. Next to the New Place is a drop-down menu. In this menu, you will see an option to import places.

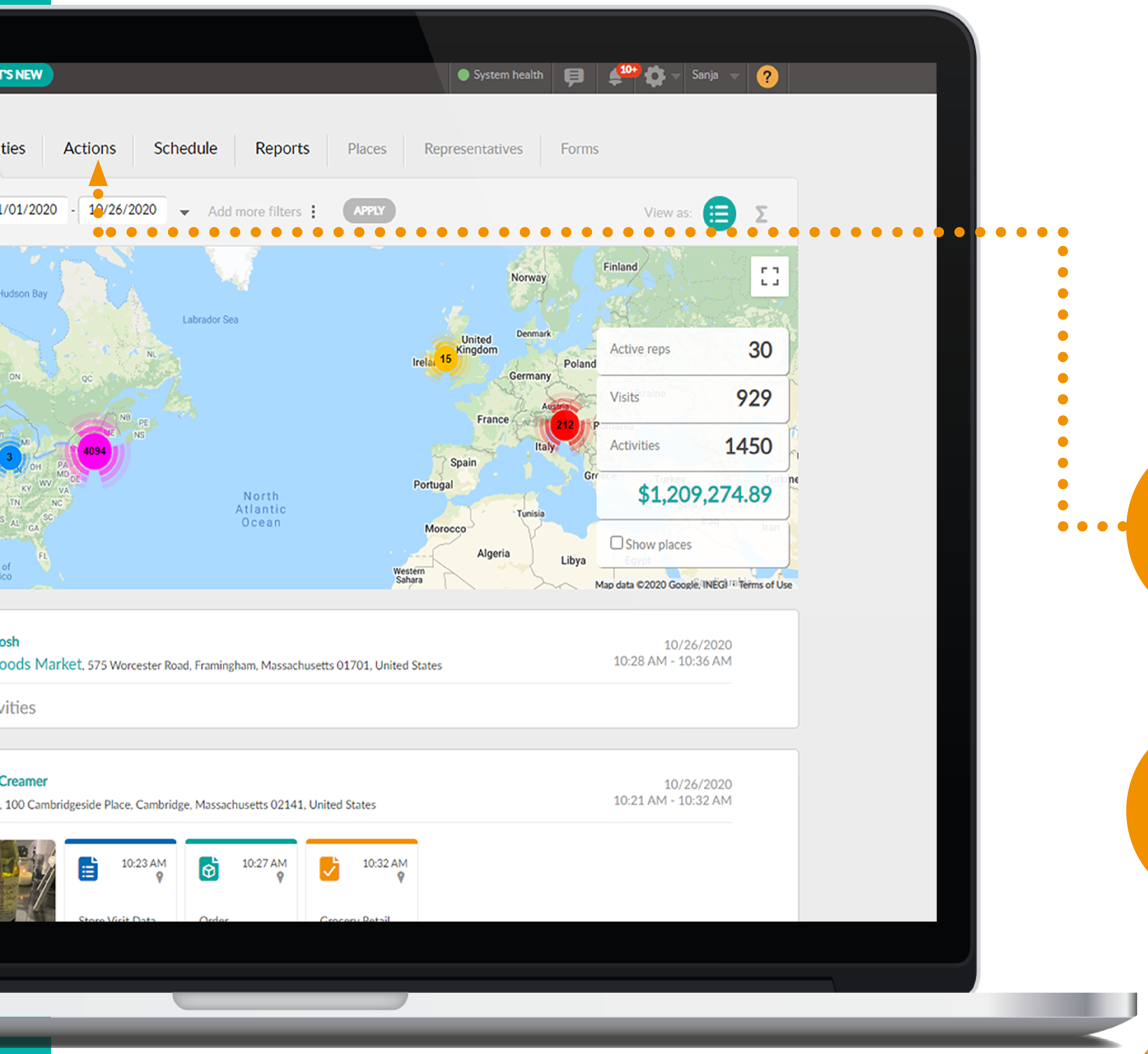


2. From the import page, choose whether to copy and paste or upload from excel.

3. Once the spreadsheet has been loaded, click Continue. This will allow you to review all of your imported data before uploading.

HOW TO CREATE DIFFERENT TEAMS BY USING TERRITORIES?

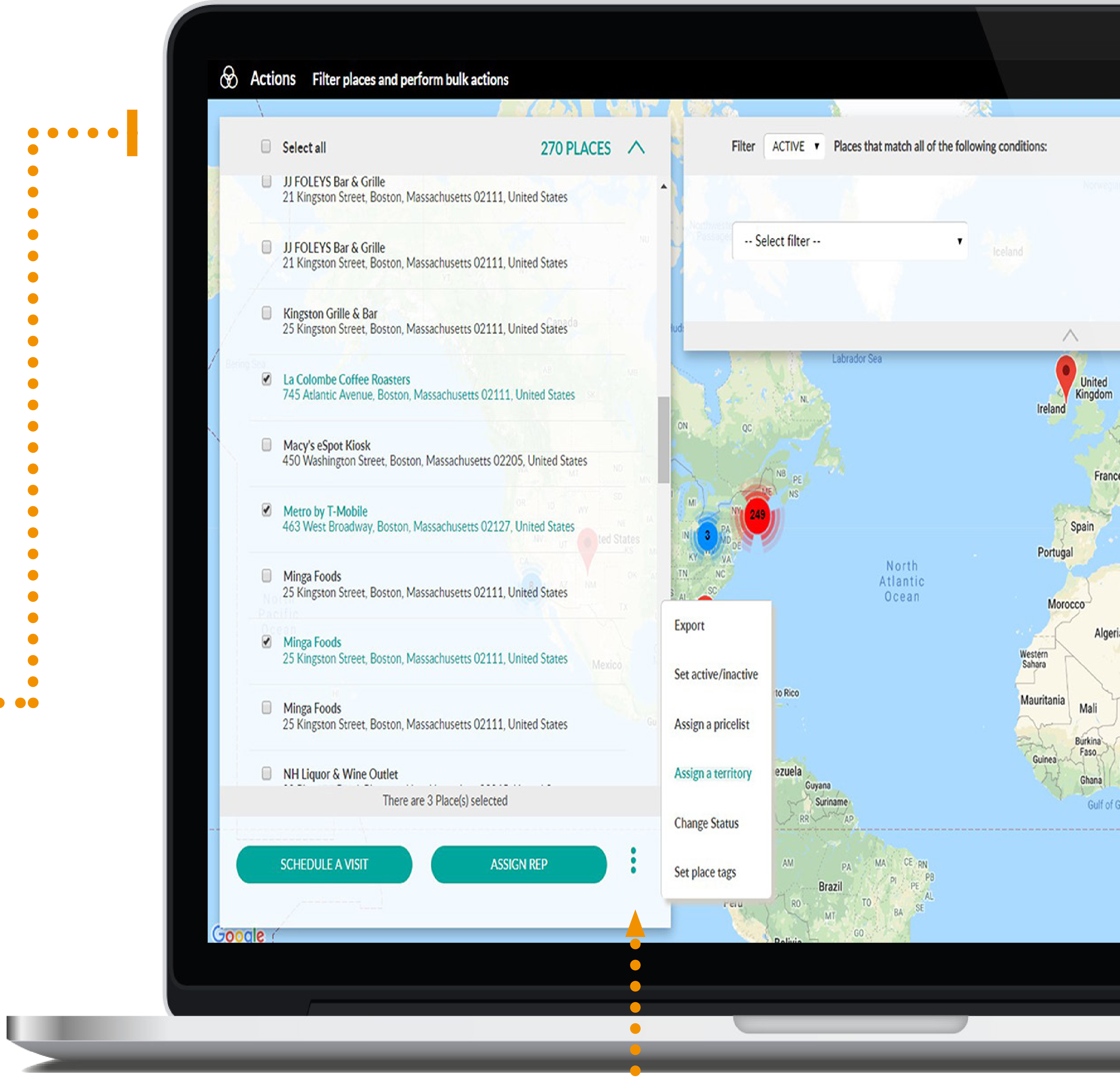
The value of creating Territories is that once you have your places divided, you can assign your representatives to specific Territories. You can assign as many representatives in a Territory as you want.

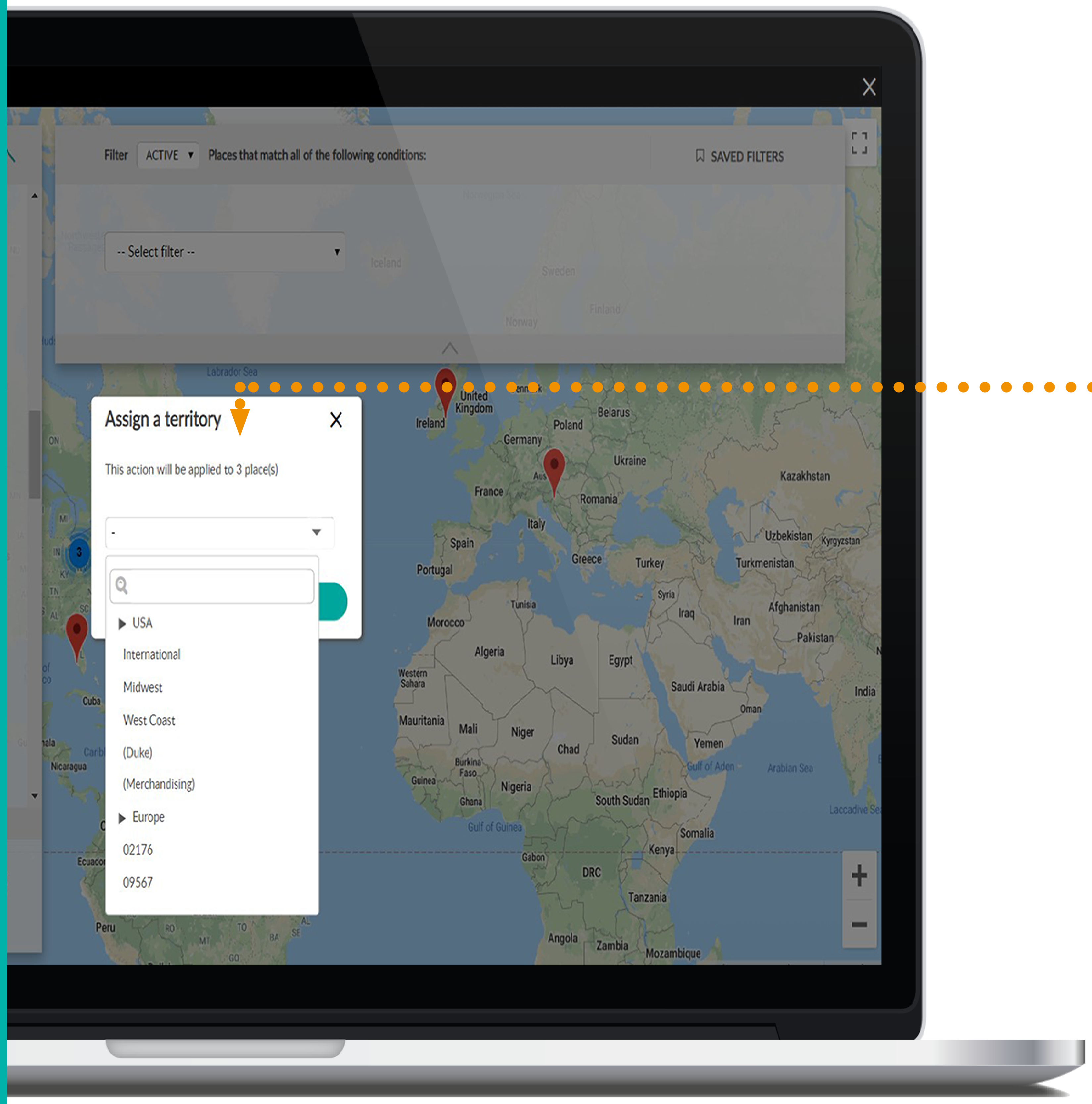


1 The **Actions tab** is located right next to the Activities tab. Click on it to enter.

2 Select the Places from the place list you want to assign to a specific territory. You can choose all by checking the *"Select all"* box.

3 When you make your selection, click on the **three vertical green dots** as pictured below.



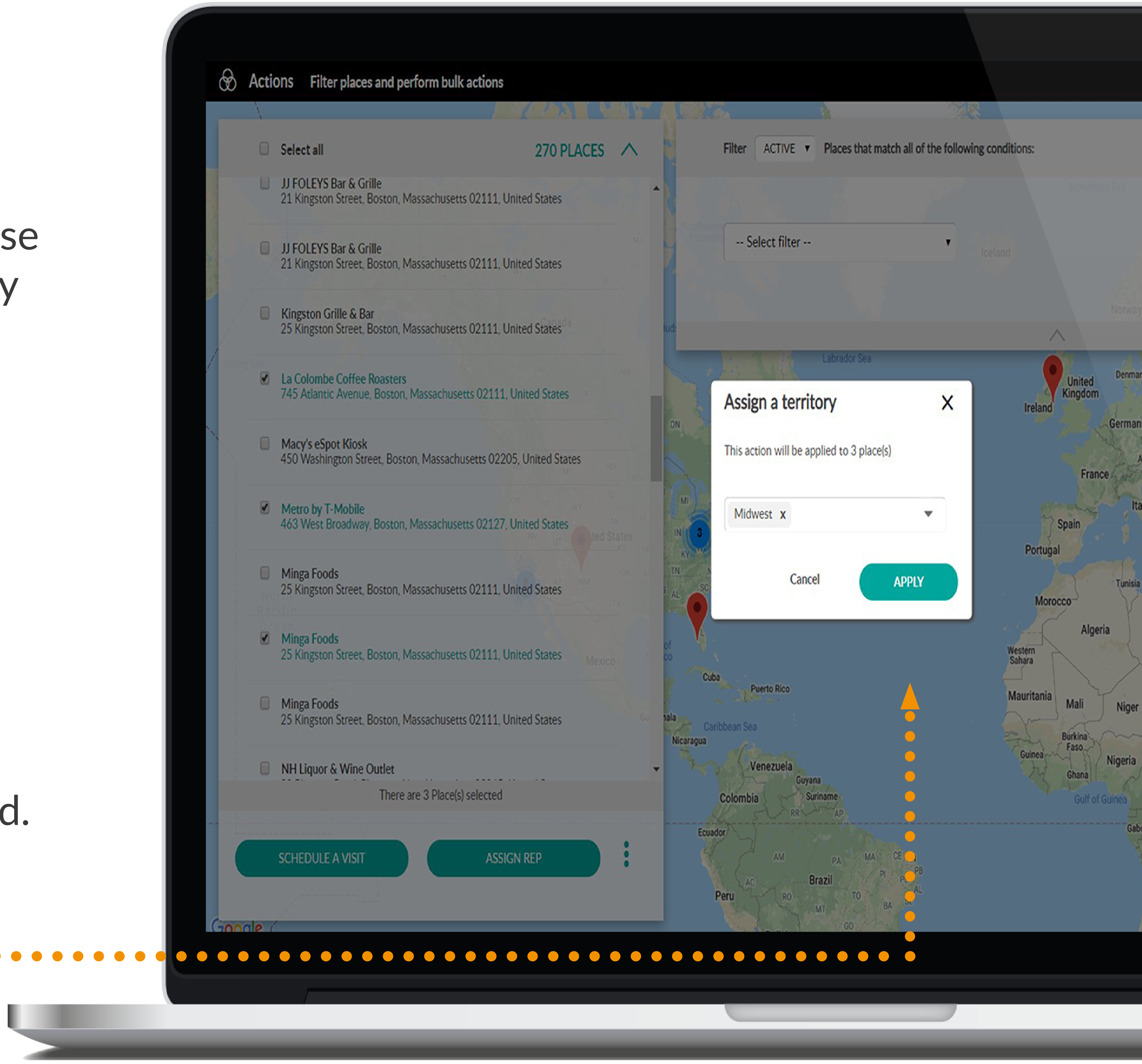


4

When you click on **Assign a territory** another window will appear with a drop-down menu with all your Territories to choose from. When you choose the desired territory click on **Apply**.

5

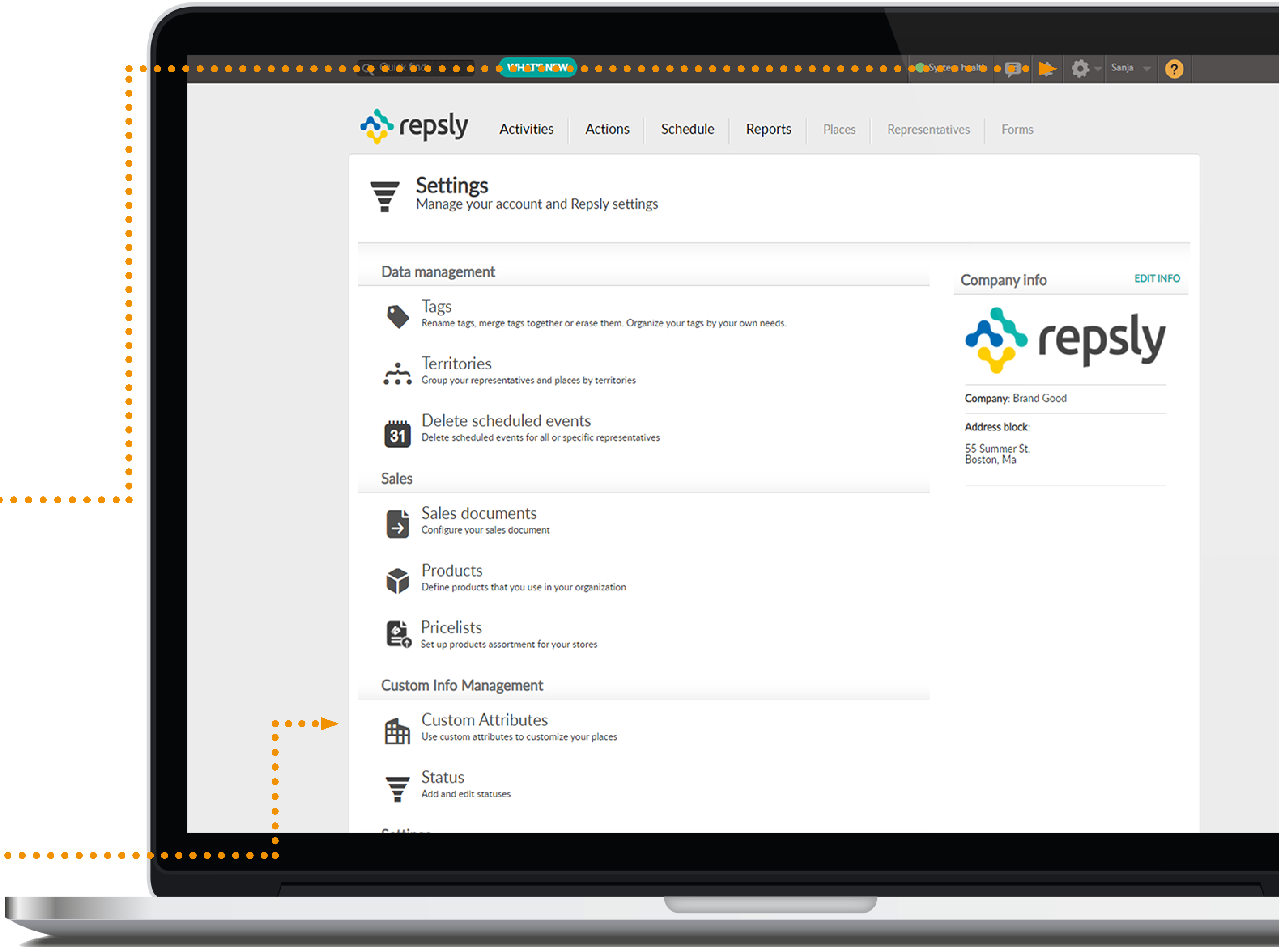
After you click on **Apply** you will see the last message *“This action will be applied to xy place(s). Are you sure you want to proceed?”*. When you click on **Confirm** you will see a message that your places have been updated.

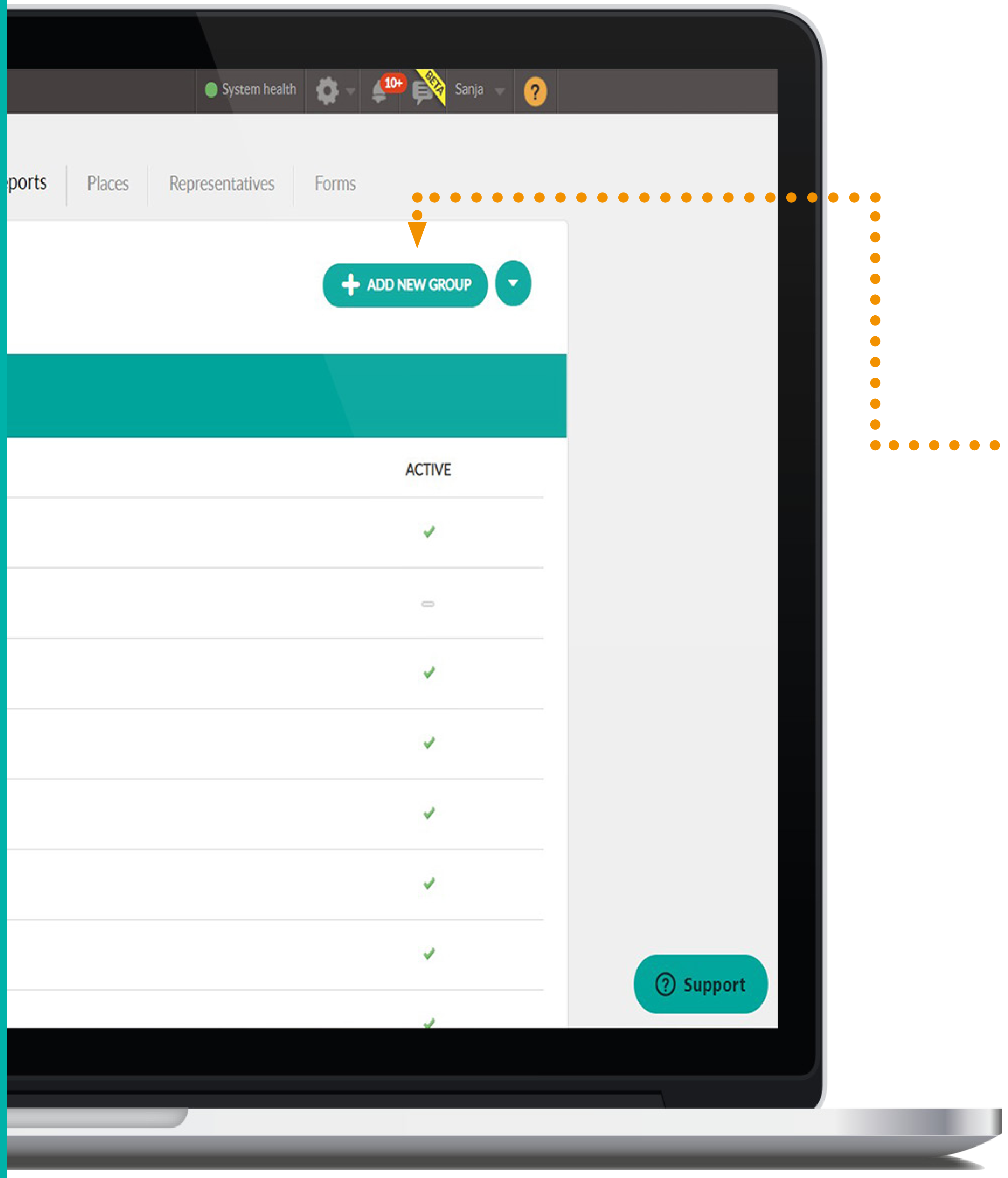


HOW TO ADD CUSTOM PLACE FIELDS TO YOUR CONTACT INFO?

Repsly allows you to add additional fields to your places. This can allow you to keep track of any additional information that you and your reps want to have handy when visiting clients.

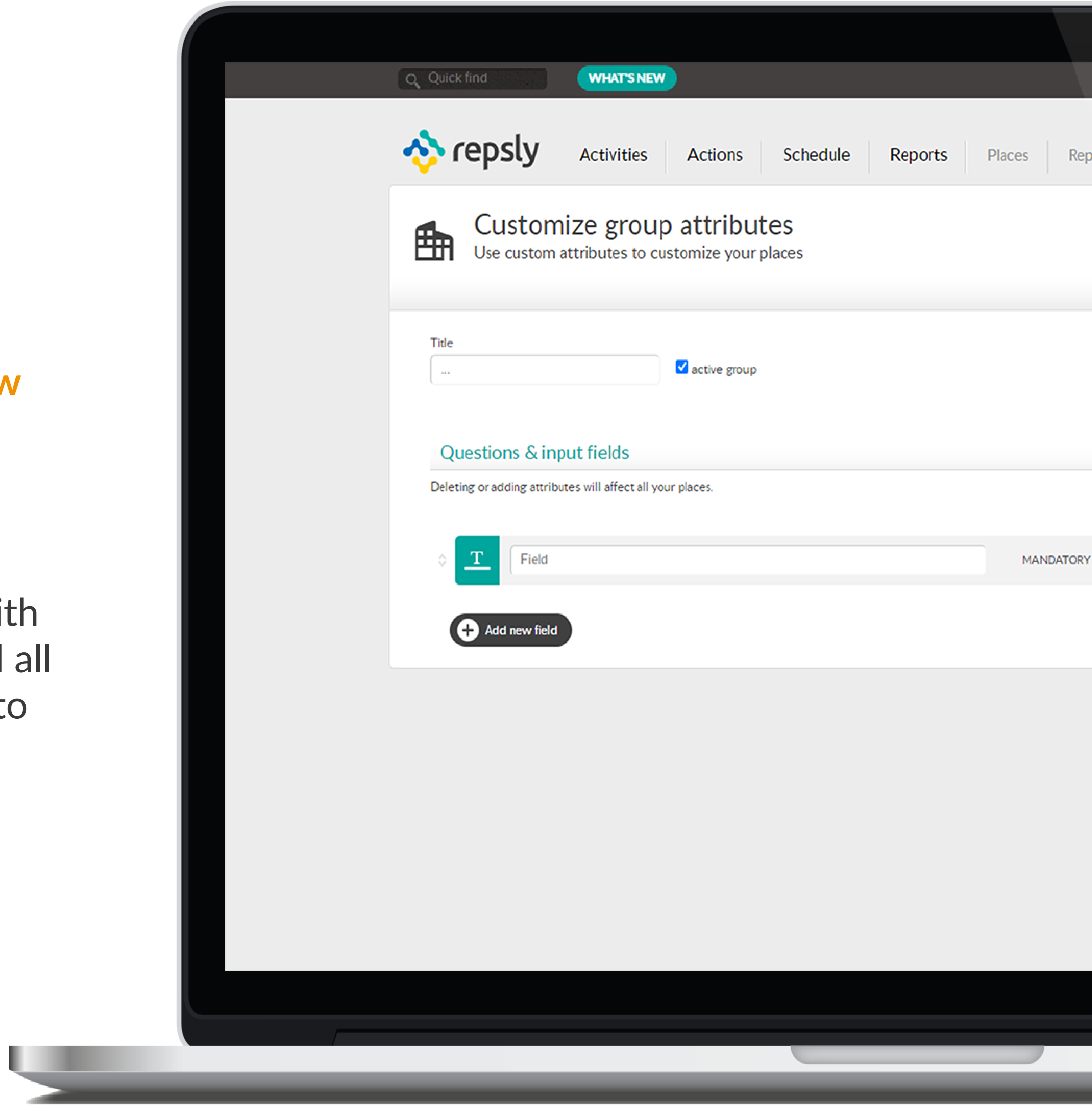
1. Click on the **Gear Icon** in the top right of the page.
2. Then click on **Settings**.
3. Then select **Custom Attributes**.





4 Create new groups by clicking the **Add New Group button**. Give the **Title Field** a name.

5 Add Fields to be filled out in association with those Group Names. Once you have added all of your necessary fields always remember to click **Save**.



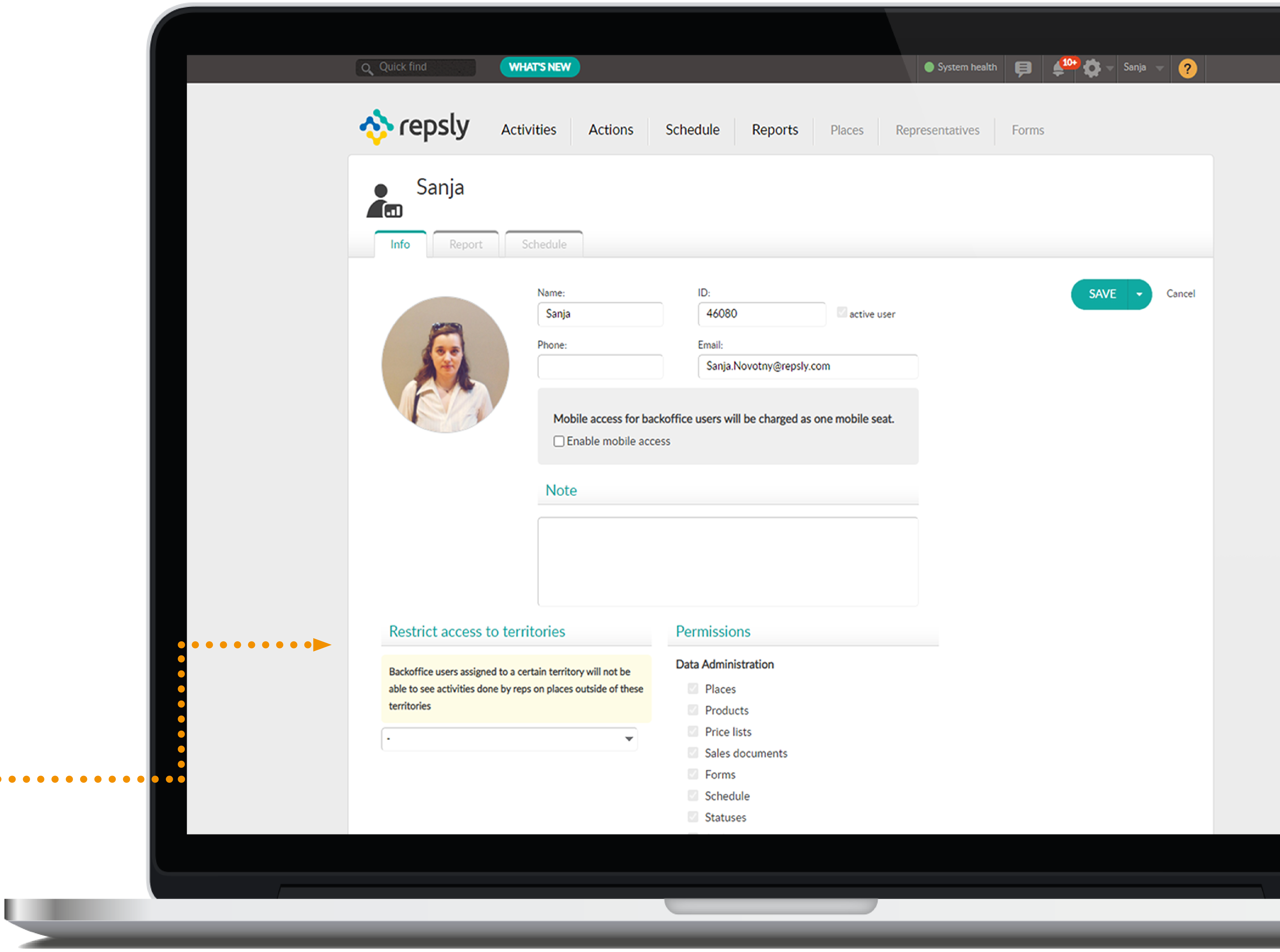
HOW TO LIMIT MANAGERS TO INDIVIDUAL TERRITORY?

Repsly makes it possible to assign a territory to another manager so that when the Territory Manager logs in, they will only be able to see data from their specific territories.

1. Click on the **Gear Icon** and select **Settings**.

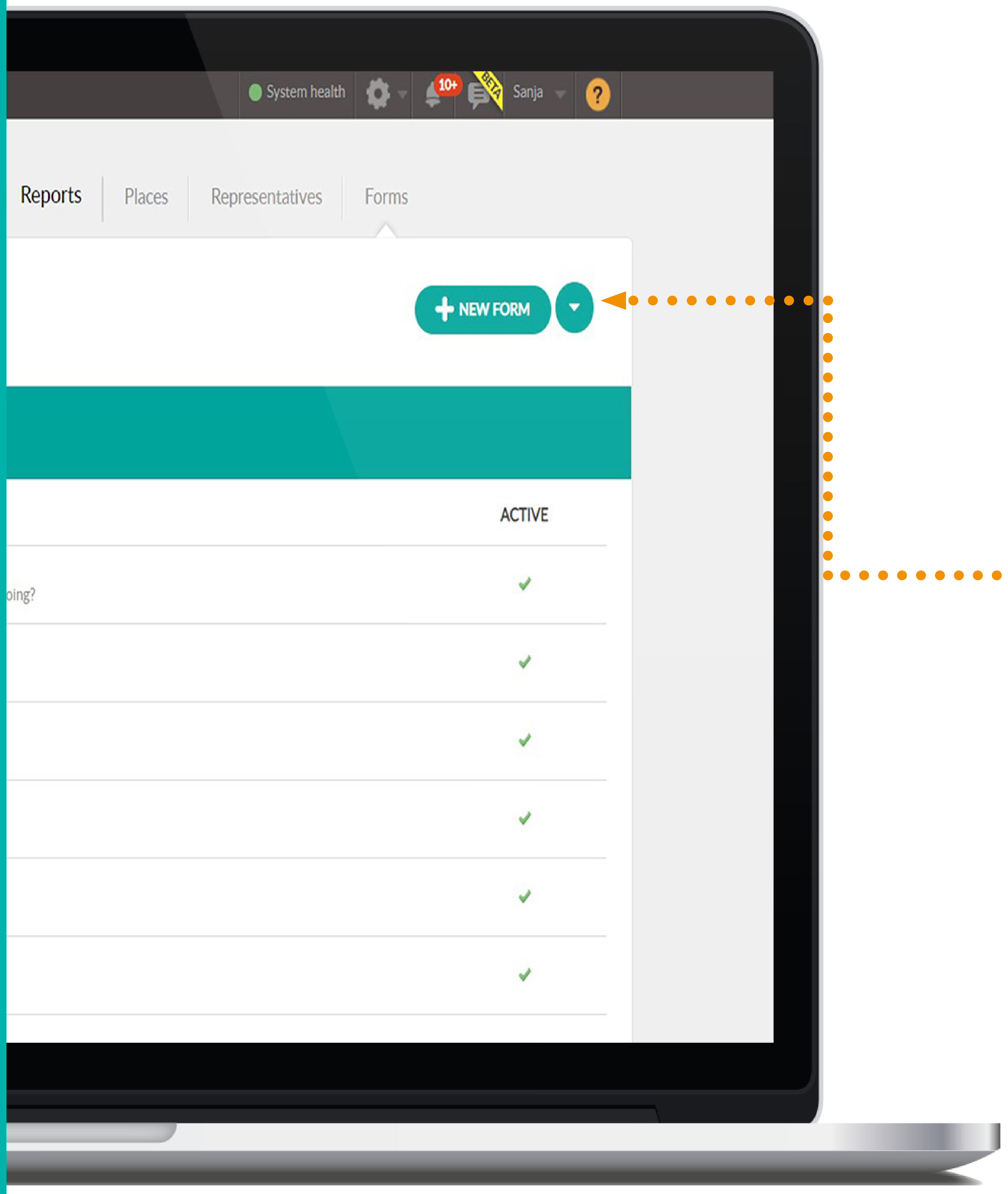
2. Click on **Backoffice users** and select the Backoffice manager to limit.

3. Then, restrict access to territories. This will allow Managers to select territories to limit to that specific user. This will allow Managers to select territories to limit to that specific user. Click **Save** to update the Manager's access.

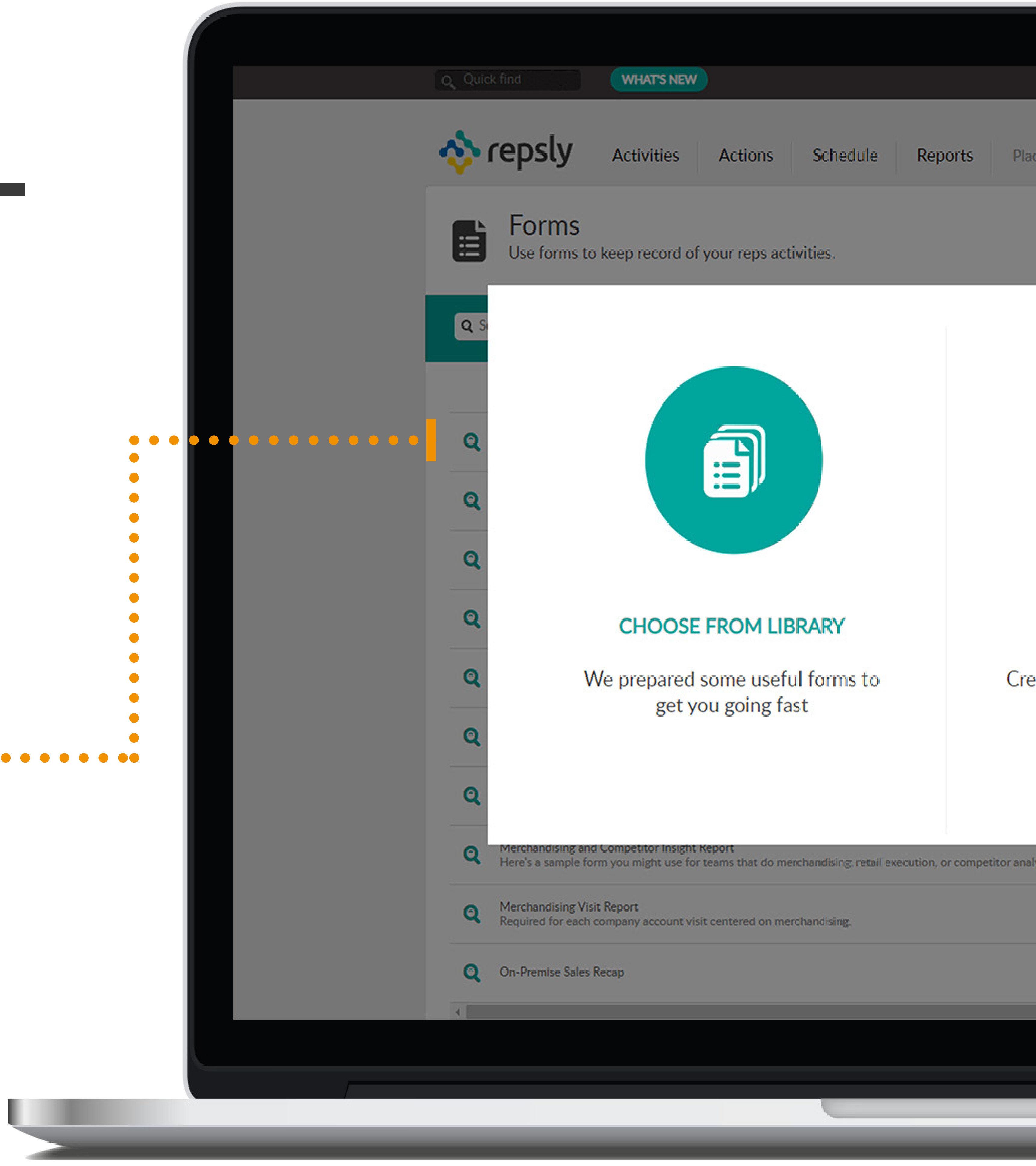


HOW TO CREATE A NEW FORM?

The Forms feature allows management to create documents that can be filled out by the representatives in the field, allowing for real-time data collection.



1 Click on the **Forms tab** and then on the **New Form button**.



2 You can select preapred useful forms or you can create your own.

3

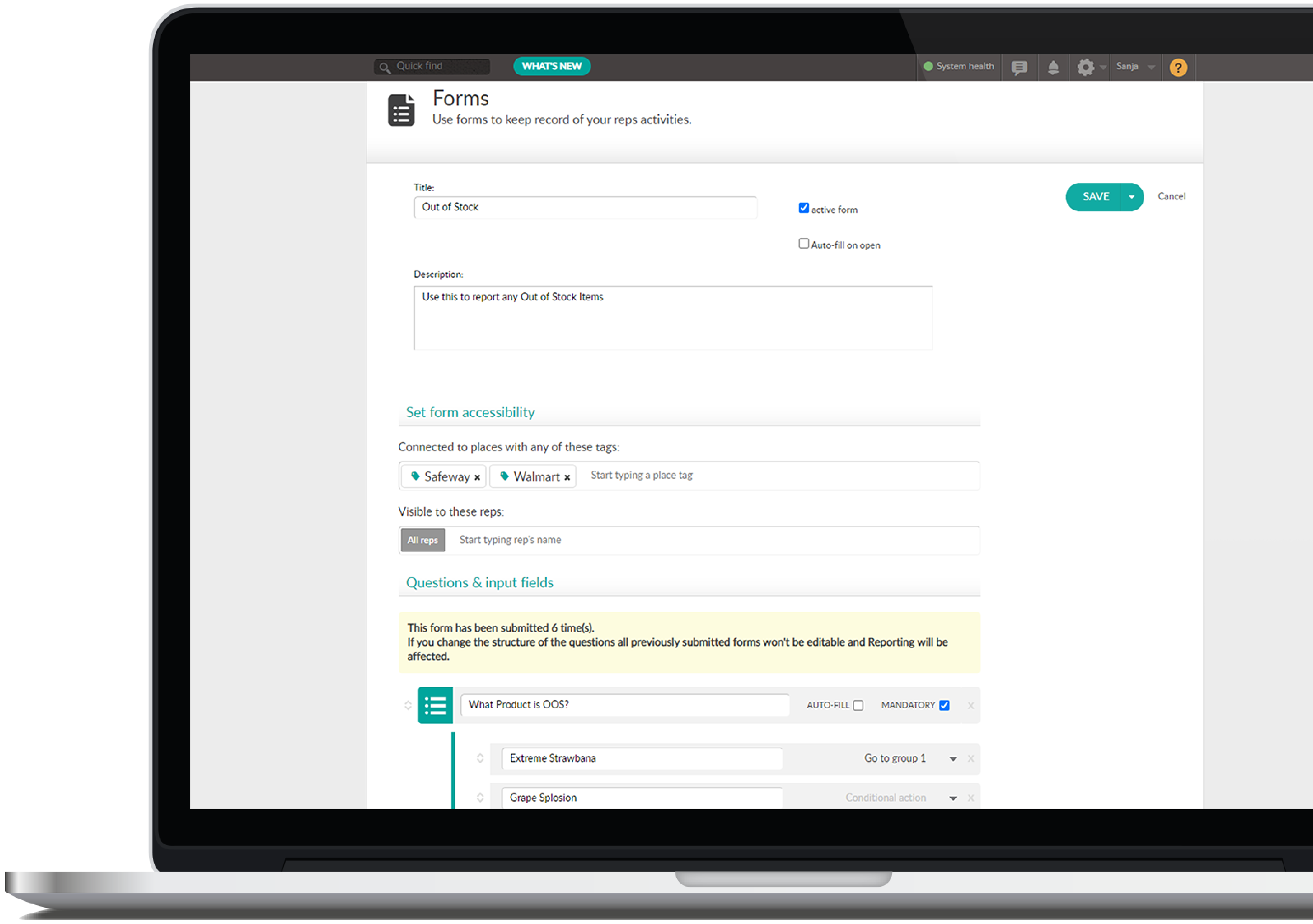
Add questions to your form and define whether the answer will be mandatory, as well as which type of data the answers will contain. When you make a question, you can also choose “conditional action” so that a response to that question leads to another set of follow-up questions.

4

Check the **Mandatory Box** if you want to make the question require. At the end of a form you can also create an alert for your form based on certain answers from form question. Once the answer set up in the alert matches the desired criteria you will get an alert on your email.

5

In the end, make sure that the form is marked as active and then click **Save**.

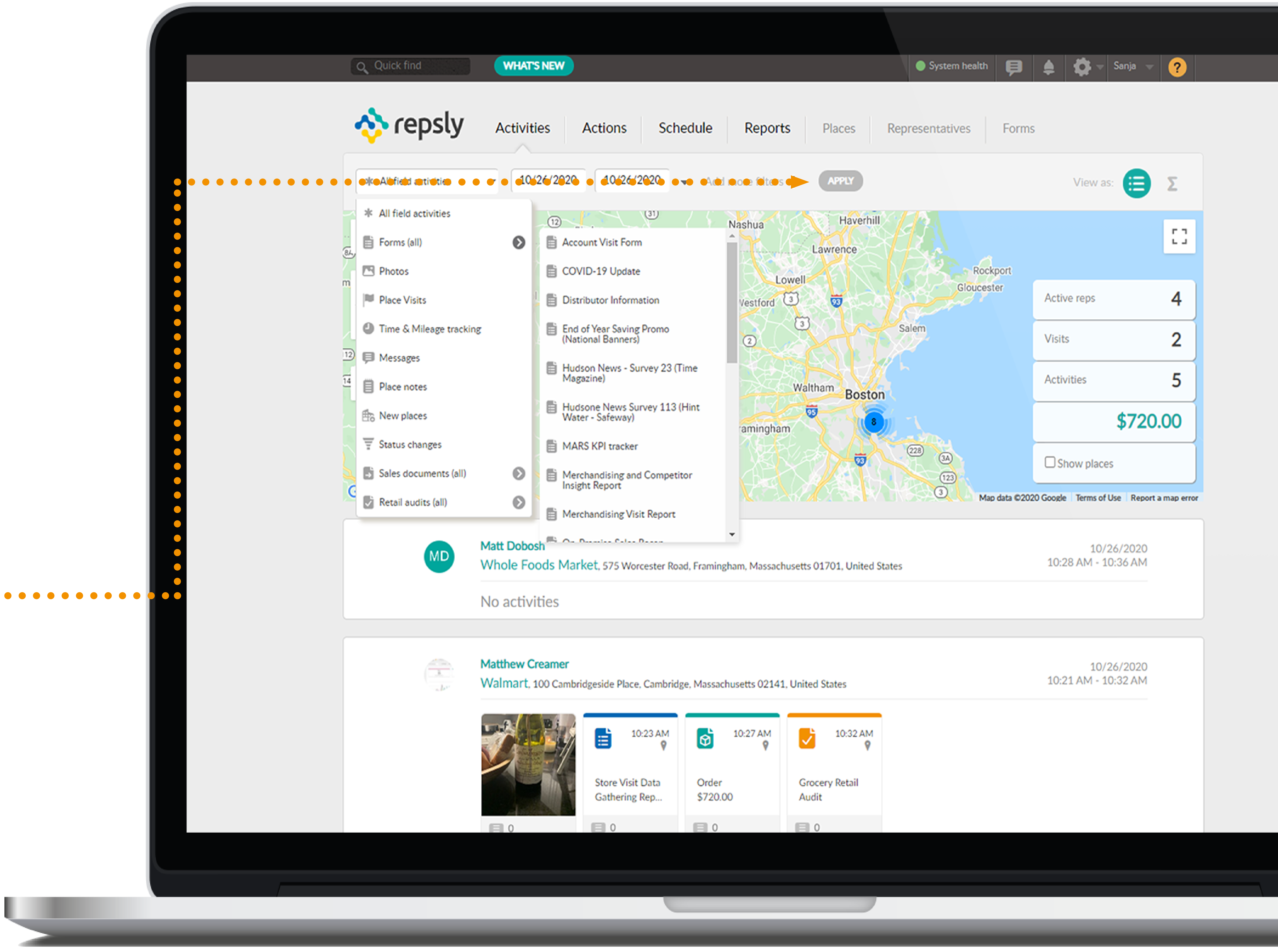


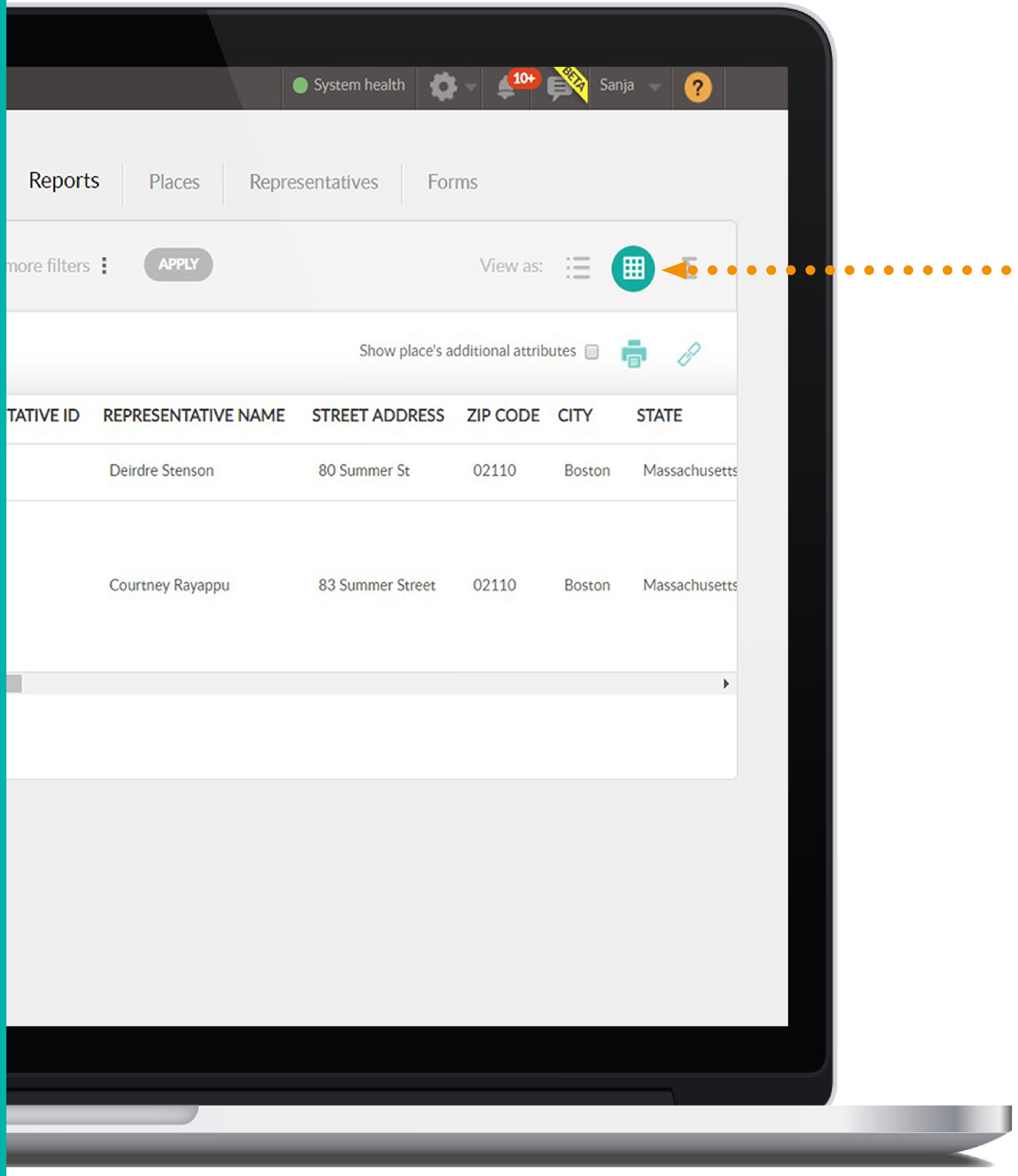
HOW TO EDIT A SUBMITTED FORM IN THE WEB APP?

One great feature in Repsly is the option to edit an already submitted form. Whatever the case is if you need to change some data in a submitted form you can easily do it from your web app.

Click on the **Activities Filter** and select forms. You can further filter by which specific form you'd like to edit. Press Apply.

1

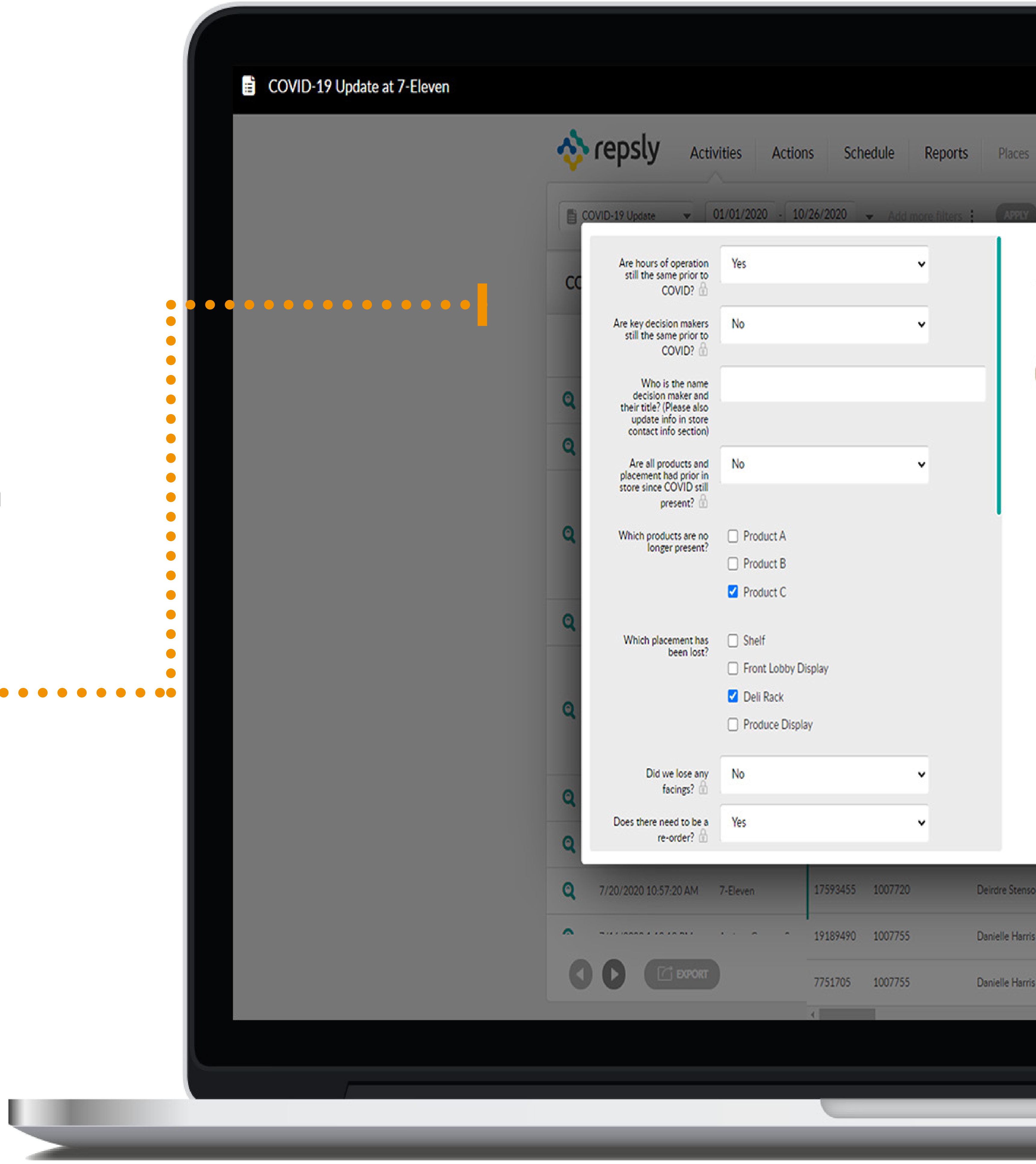




2 Click on the **Tabular View Icon**.

3 Click on the magnifying glass next to the form you'd like to edit.

4 You now have access to edit the information on the submitted form. Once you're done editing the information you'd like to change, press the **green check mark**.

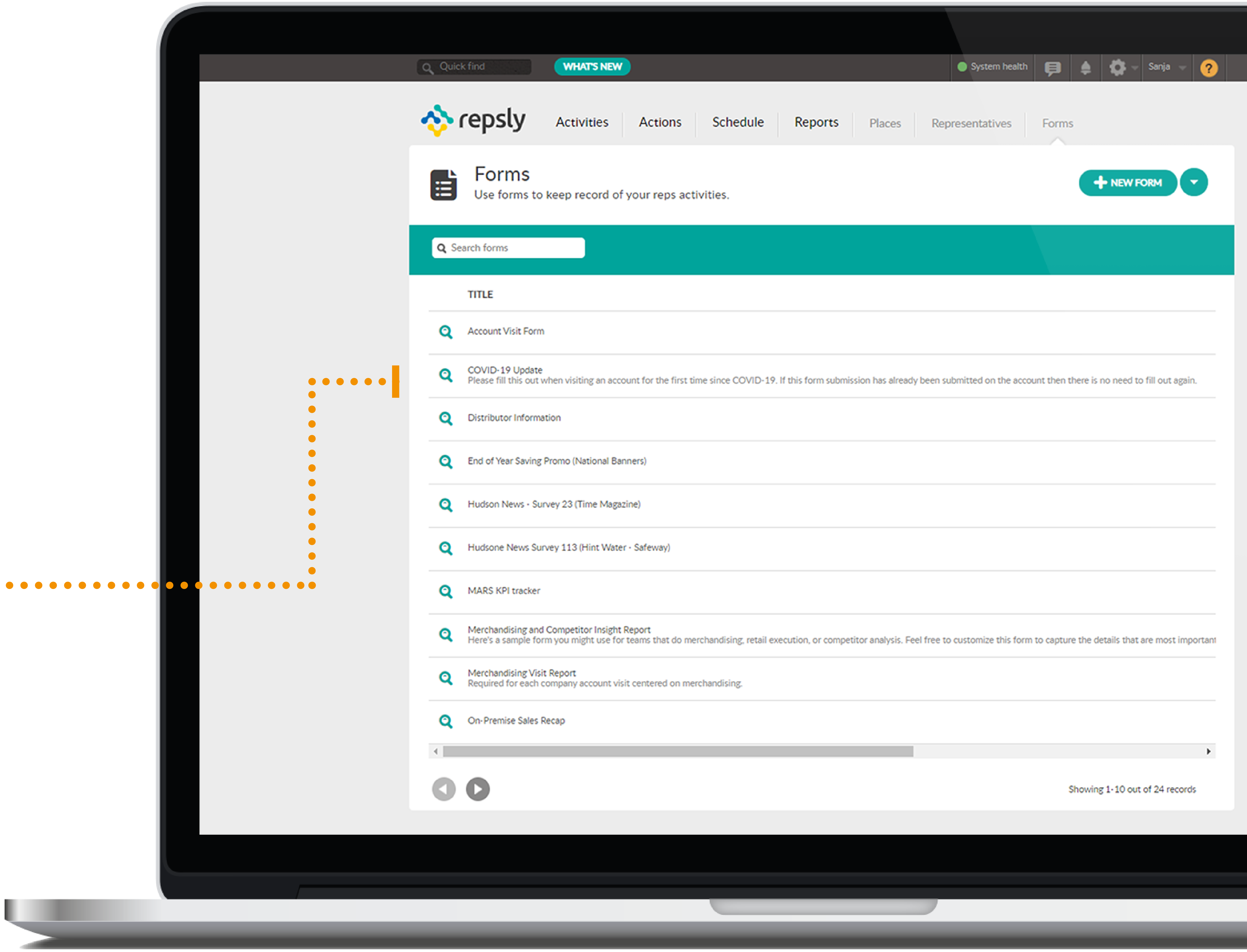


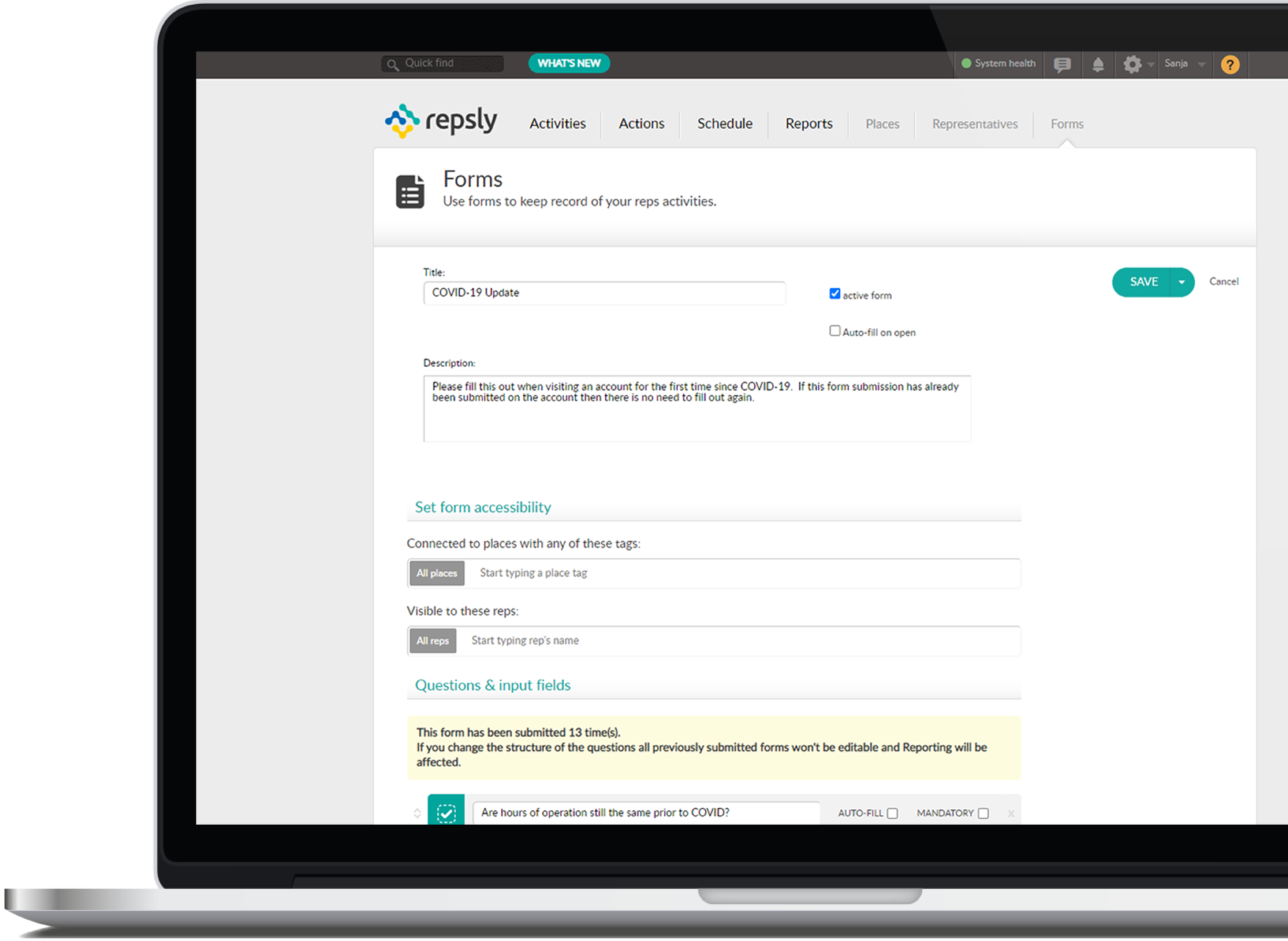
HOW TO ASSIGN A FORM TAG?

You can limit visibility to places with specific tags, and to specific reps by name. This cuts down on confusion, and thus makes your reps more efficient in the field.

1

Click on the **Forms Tab**. Click on the magnifying glass beside the form you wish to assign to a particular place or rep.





2

In order to tag a form to a place, select a tag assigned to that place to sync that form with that specific place. By doing this you will make only places with that tag have access to that form.

3

In order to assign forms to reps simply type in the names of the reps, you wish to have access to the form. After assigning tags or rep assignments to forms, **Save** the assignments.

HOW TO USE ACTIVITIES TAB?

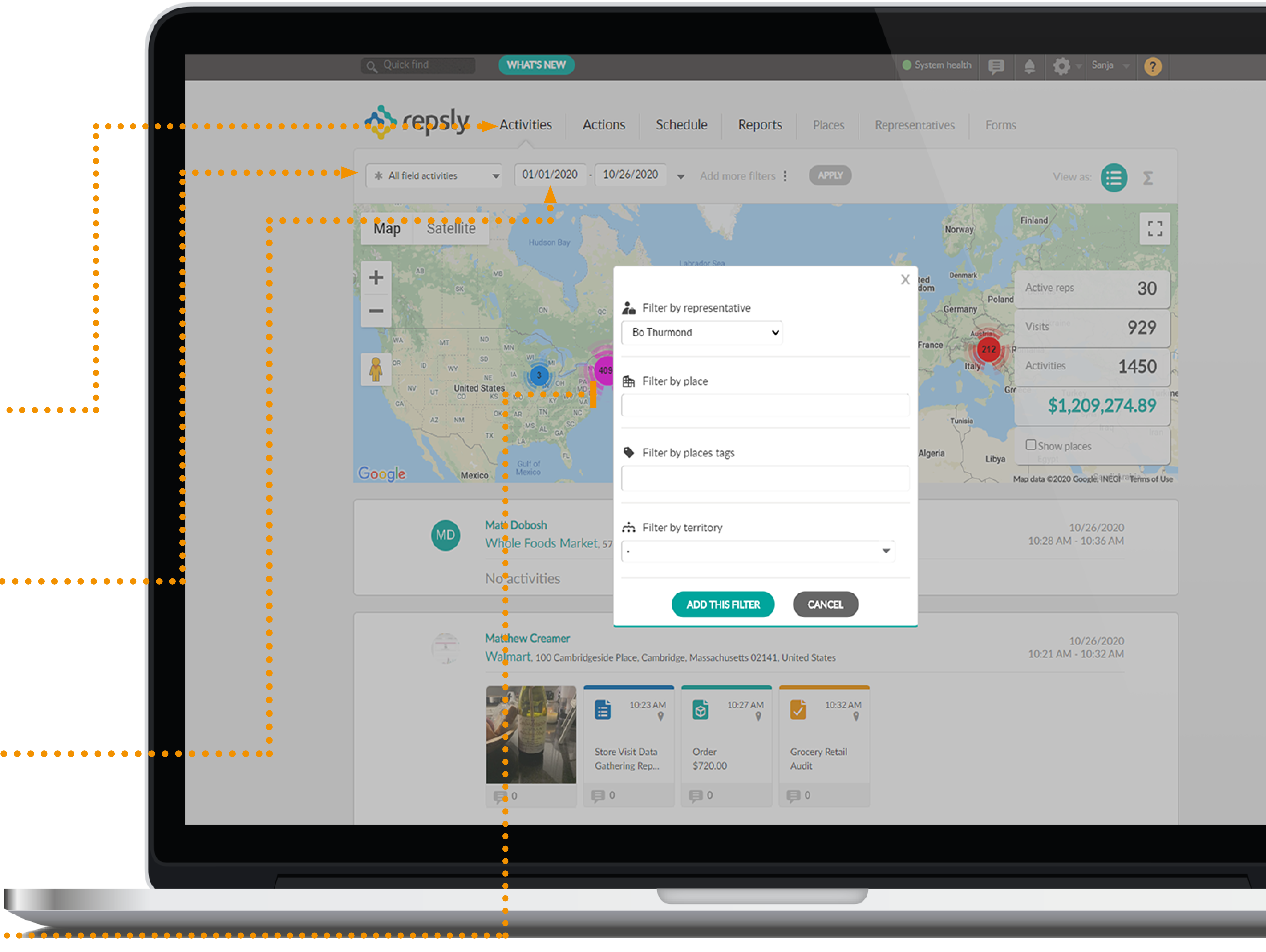
Applying filters will allow management to see and analyze specific activities, people or places in order to manage and analyze data more consistently.

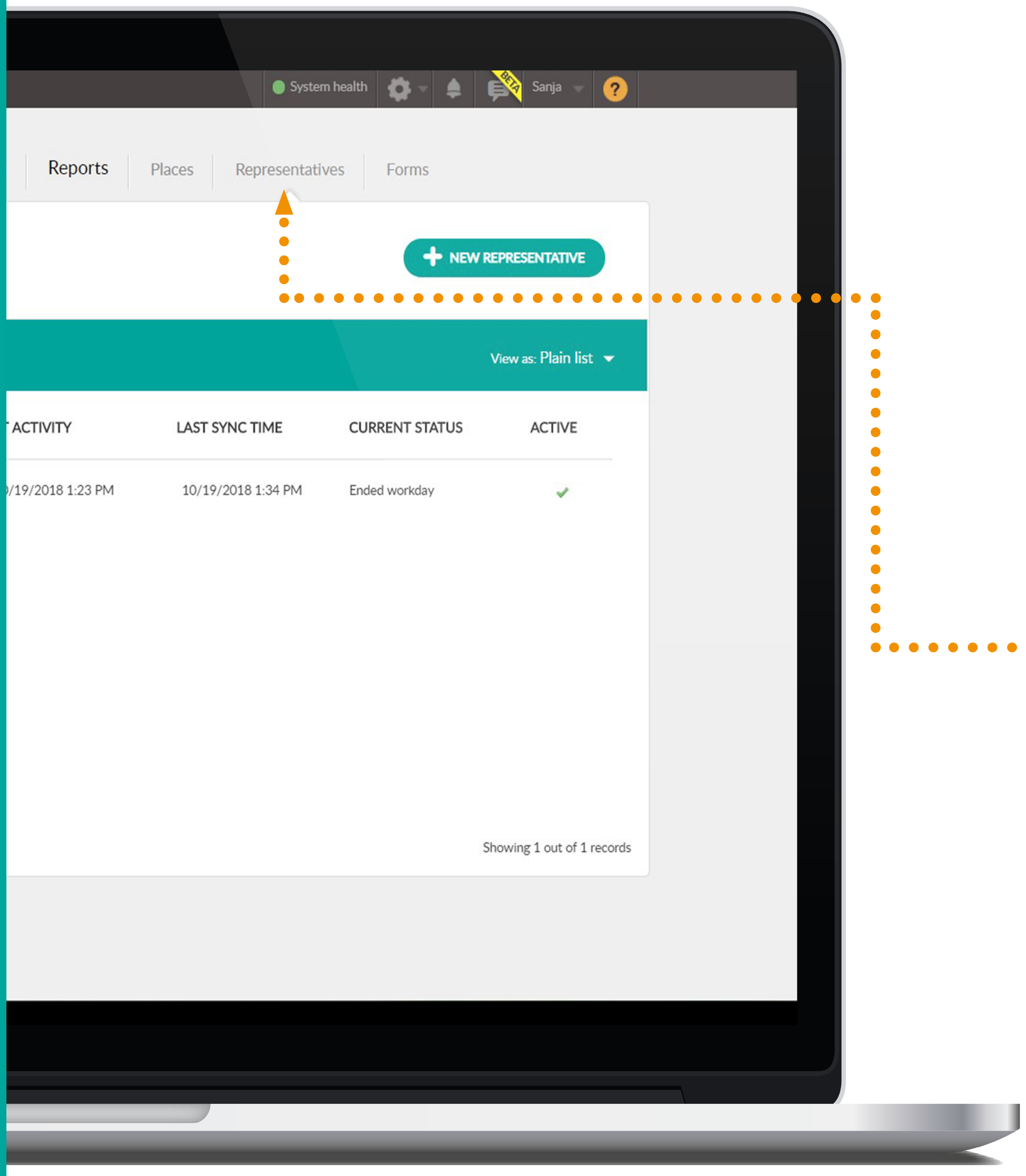
1 Click on the Activities tab to filter activities.

2 If you select ***All Field Activities***, your news-feed will show all activities chronologically. Use filters above the map to narrow your search criteria.

3 The date filter allows you to filter by date range.

4 The additional filters tab allows you to filter by a specific rep, place, tag or territory. Tags are the best way to filter by specific account segments.





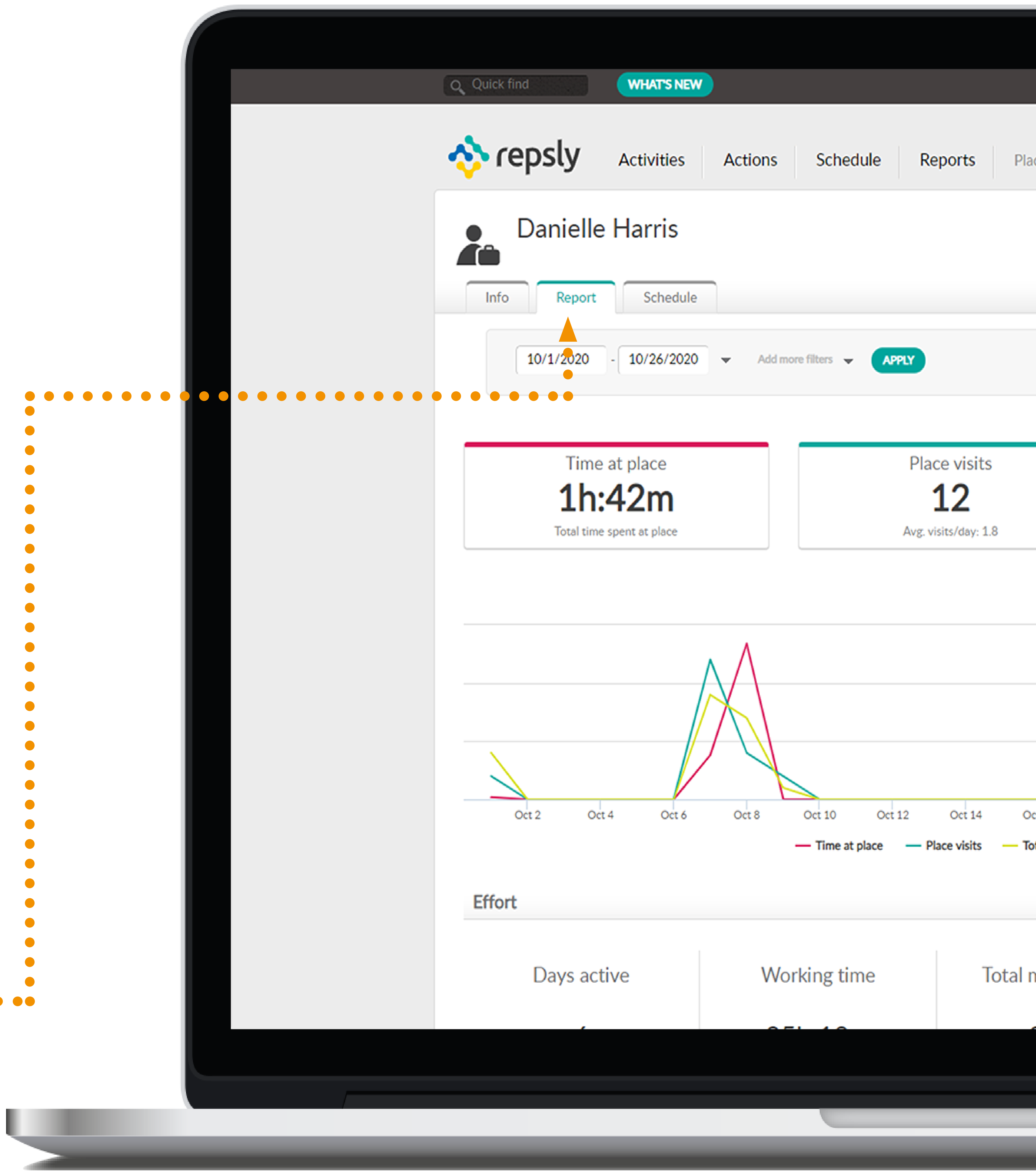
HOW TO VIEW REP SUMMARY REPORT?

Repsly automatically turns the data your team collects in the field into flexible, digestible. The Reports Tab helps managers visualize their data through real-time trend analysis.

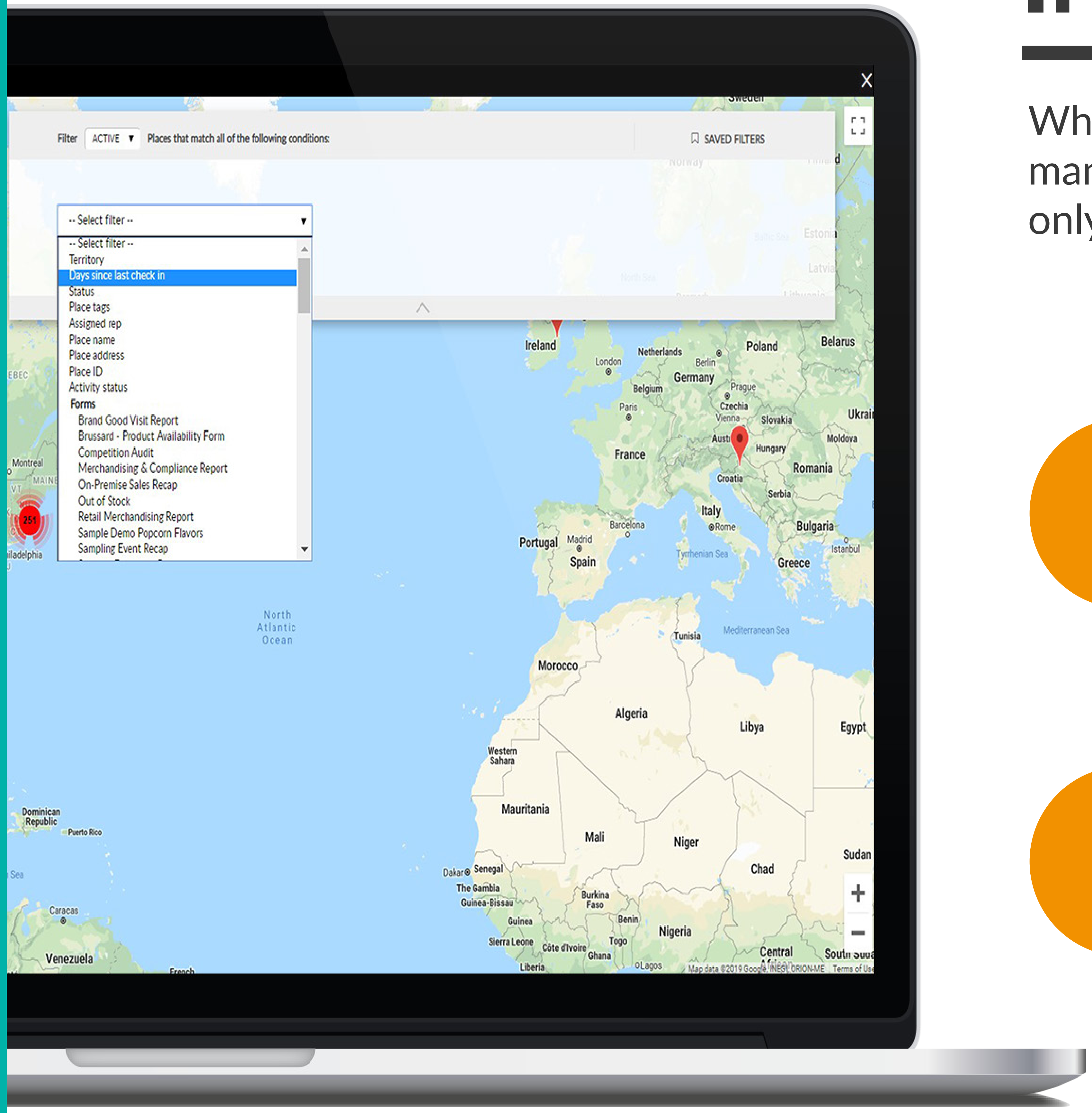
1. Click at the **Representative tab** and select a Representative.

2. Click on a **Reports tab**.

3. The date filter allows you to filter by date range. The additional filters tab allows you to filter by a territory, tag or representative.



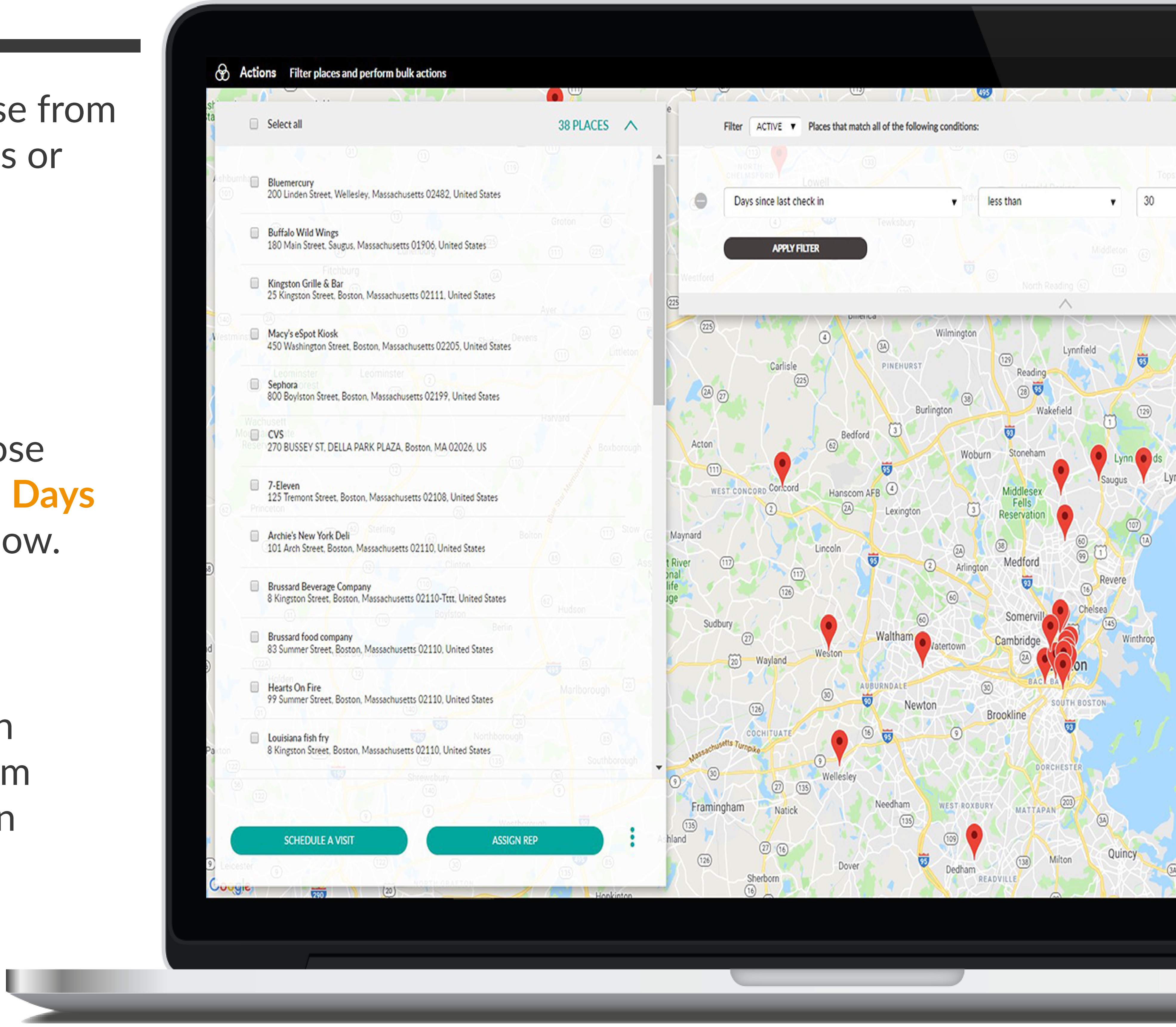
HOW TO FILTER PLACES IN THE ACTIONS TAB?

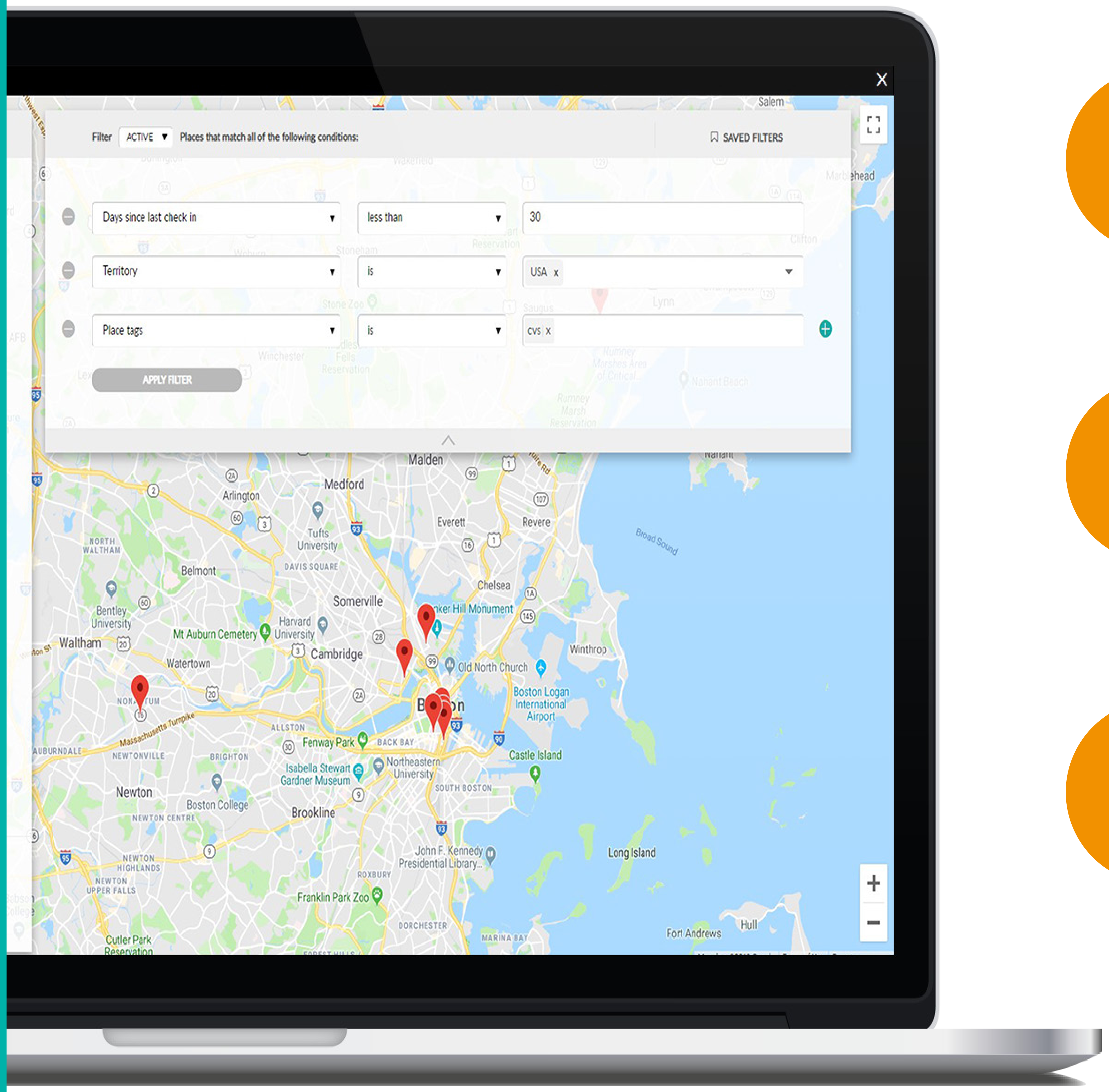


When it comes to filtering your places, you can choose from many different attributes. You can filter ALL the places or only ACTIVE ones.

1. When you enter **Actions** you will see a drop-down menu with the filters to choose from. In our example, we will choose the **Days since last check** in filter as illustrated below.

2. After you select the desired filter you can narrow the search down by choosing from another set of filters from the drop-down menu on the right.



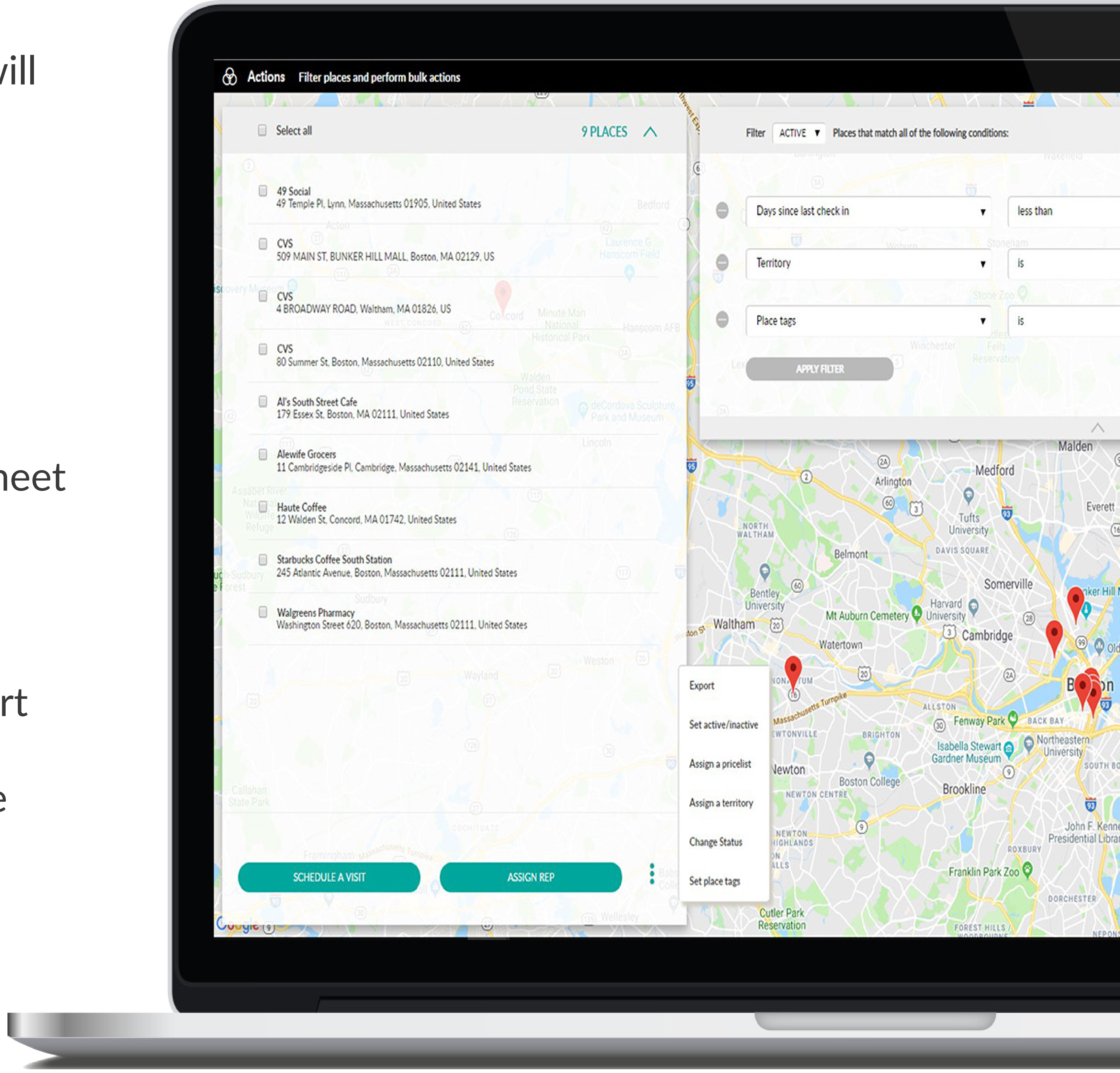


3 After you determine the second filter you will see a third field appear that will require a numeric value as an answer for the second filter.

4 Once you set up these filters and click on **Apply** on the left side of the page on your Place list you will see only the places that meet the criteria you just set with your filters.

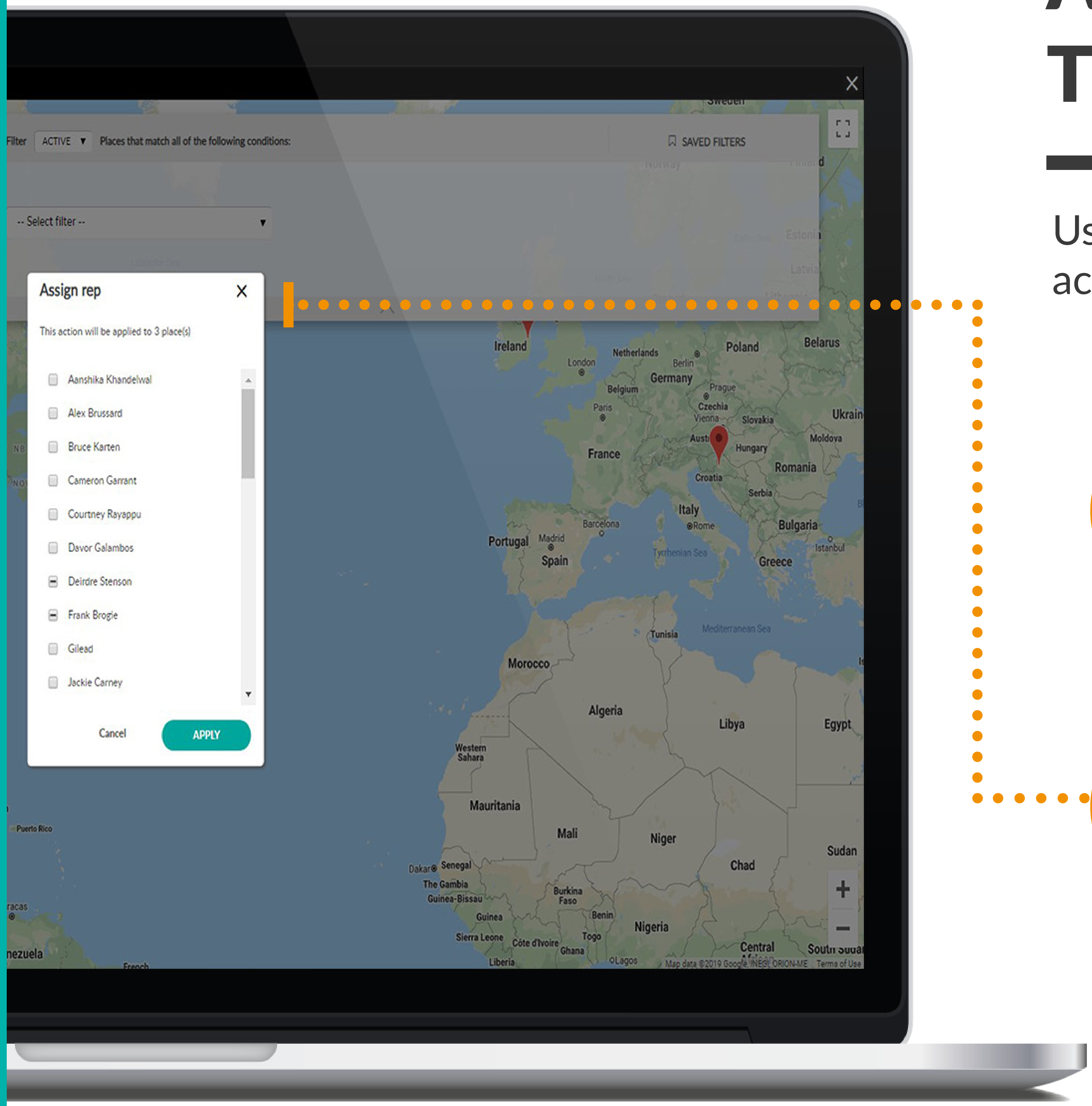
5 Once you filtered your places you can export them, assign them to a rep or click on the **three vertical green dots** and perform more bulk actions:

Set active/inactive
Assign a territory
Change Status
Set place tags



HOW TO PERFORM BULK ACTIONS BY ASSIGNING REPS TO PLACES IN ACTIONS?

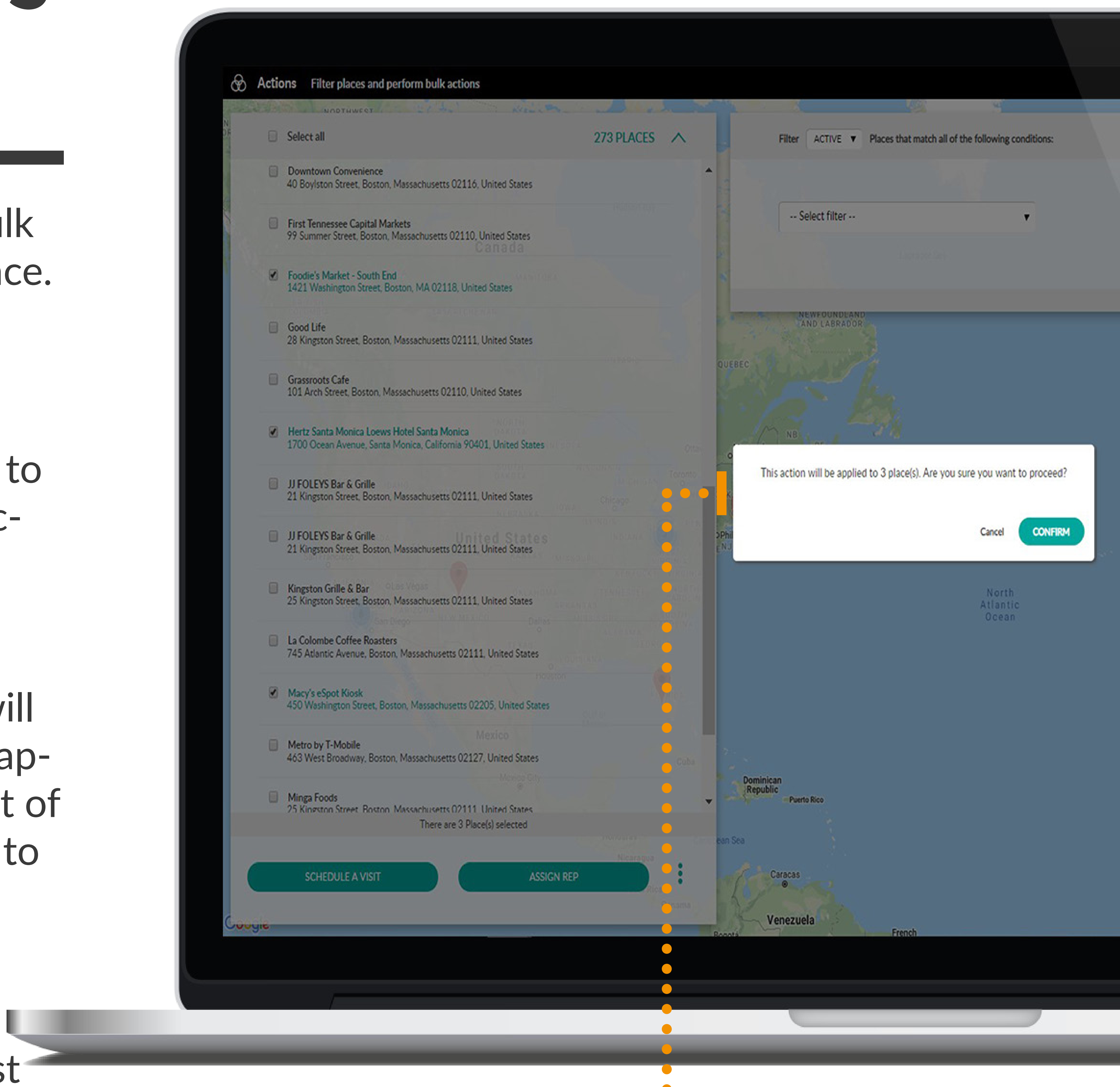
Using the Actions tab you can filter places and perform bulk actions like assigning representatives to more places at once.



1. Click on the **Actions tab**. Select the Places from the place list you want to be assigned to representatives. When you make your selection, click on the **Assign rep**.

2. When you click on **Assign Rep**, a window will appear with a message "This action will be applied to xy place(s)" and a window with a list of your representatives will open so you have to check the ones you wish to assign to the selected places.

3. After you click on **Apply** you will see the last message. When you click on **Confirm** you will see a message that your places have been updated.

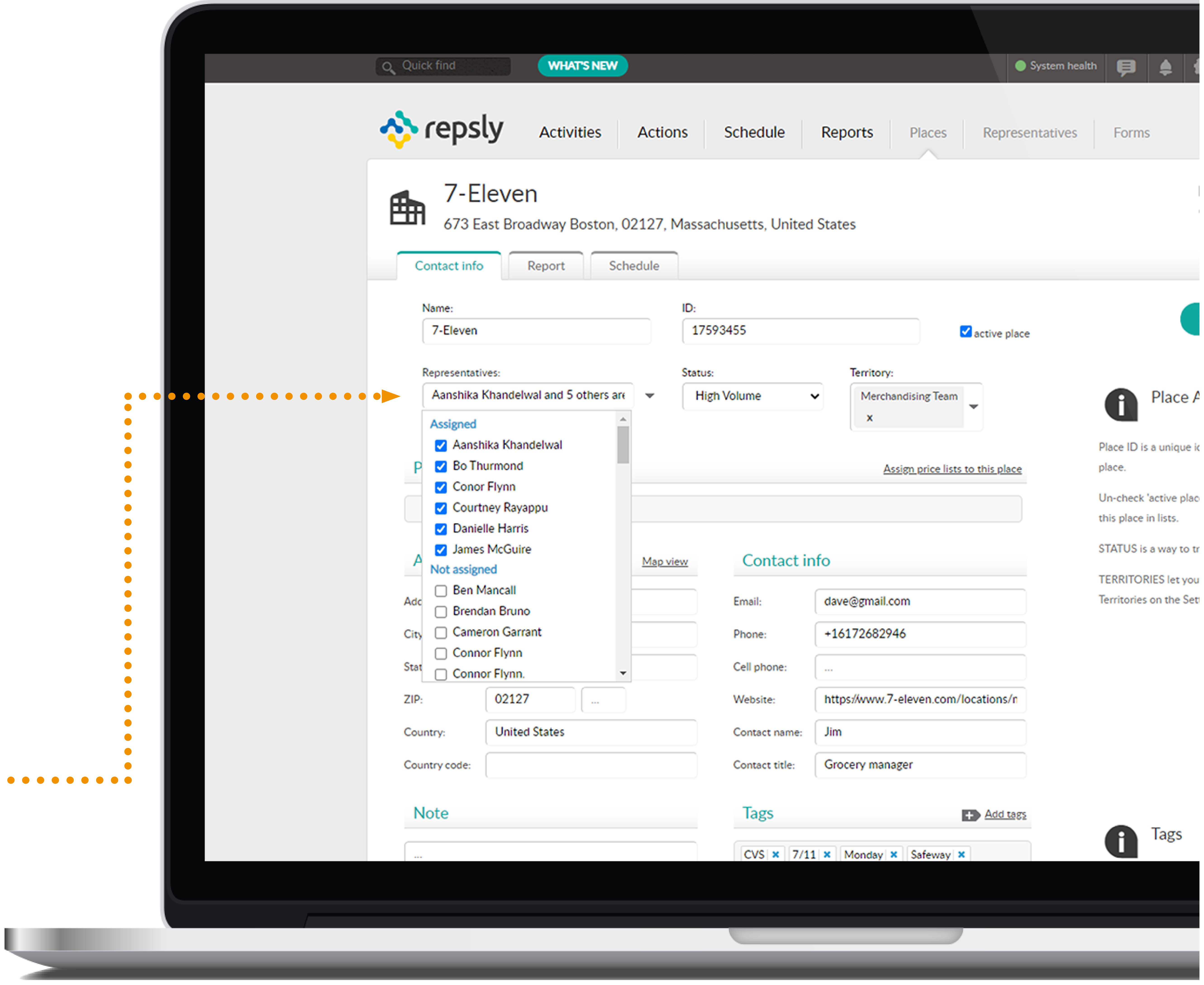


HOW TO ASSIGN REPS TO SPECIFIC PLACES IN ONE BY ONE OR IN BULK?

On the Repsly Web app, you can easily assign reps to specific places. If you enable this feature, only the reps assigned to a location will have access to that place and they will be the only reps that can complete activities at that location.

1. Click on the **Places tab**. From your list of Places, click on the specific place you want to update.

2. On the place's profile, there is a section labeled **Representatives**. Using the drop-down menu, you can assign reps to that particular place. Press **Save** after you're done assigning reps.



HOW TO SEND A MESSAGE?

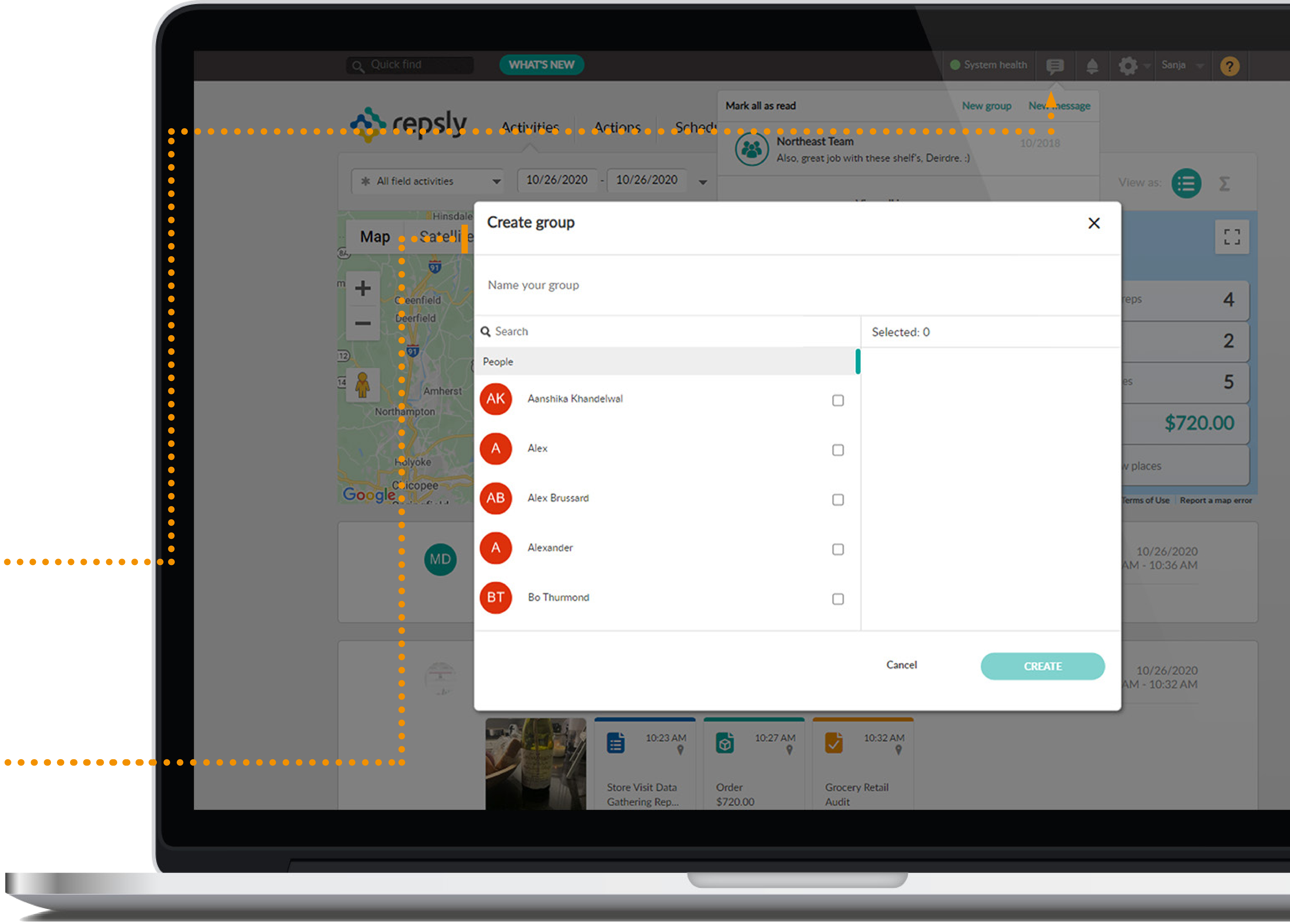
Messaging is our new feature for sharing insights or wins (including photos) in context while reps are doing their work. Managers can easily get information out to their entire team or coach individual teammates 1:1.

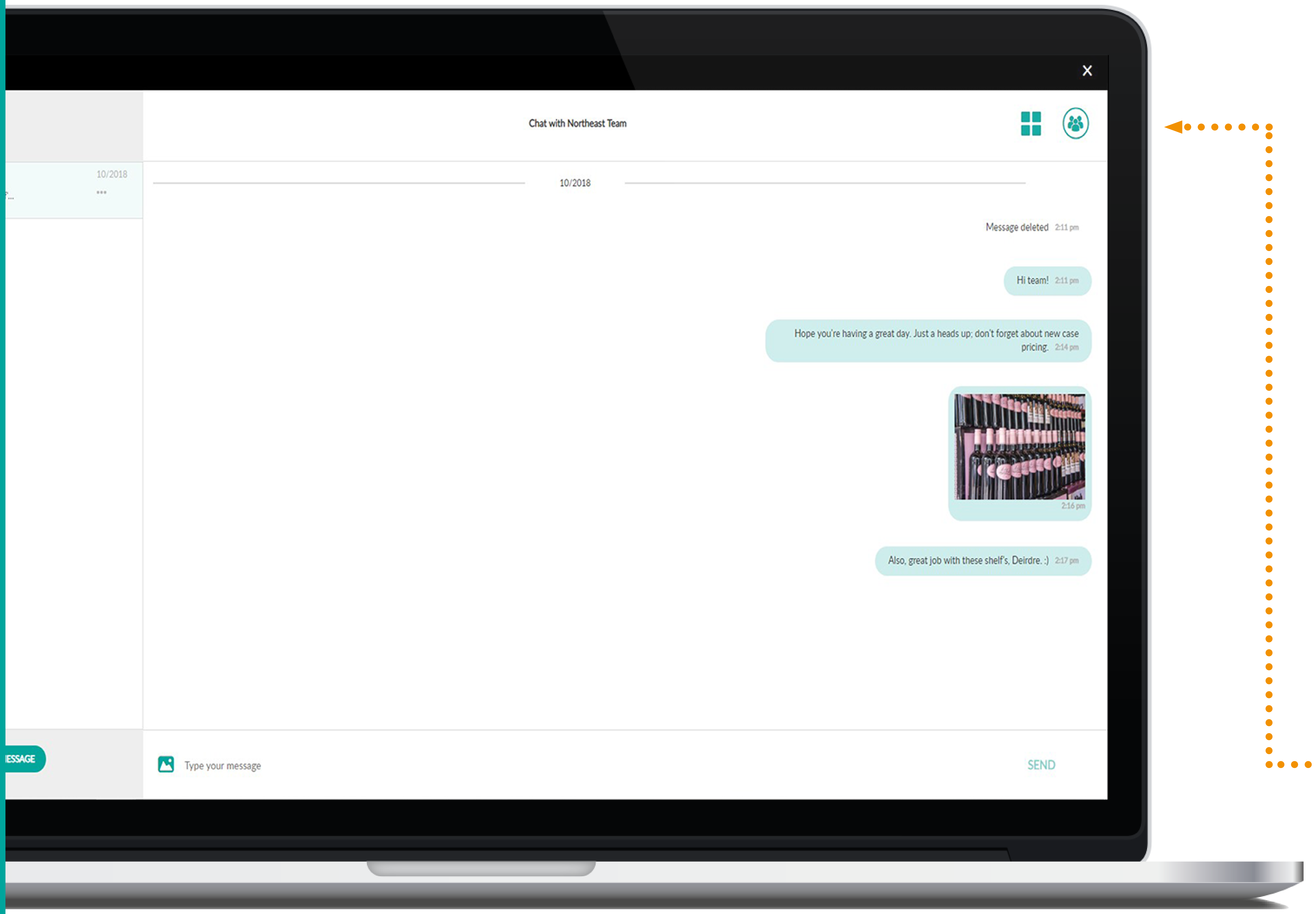
Find the **Messaging** module in your menu.

1

Create a new chat and select teammate(s).

2





3 Type your message or choose the camera.

4 Manage your group with the top right menu.

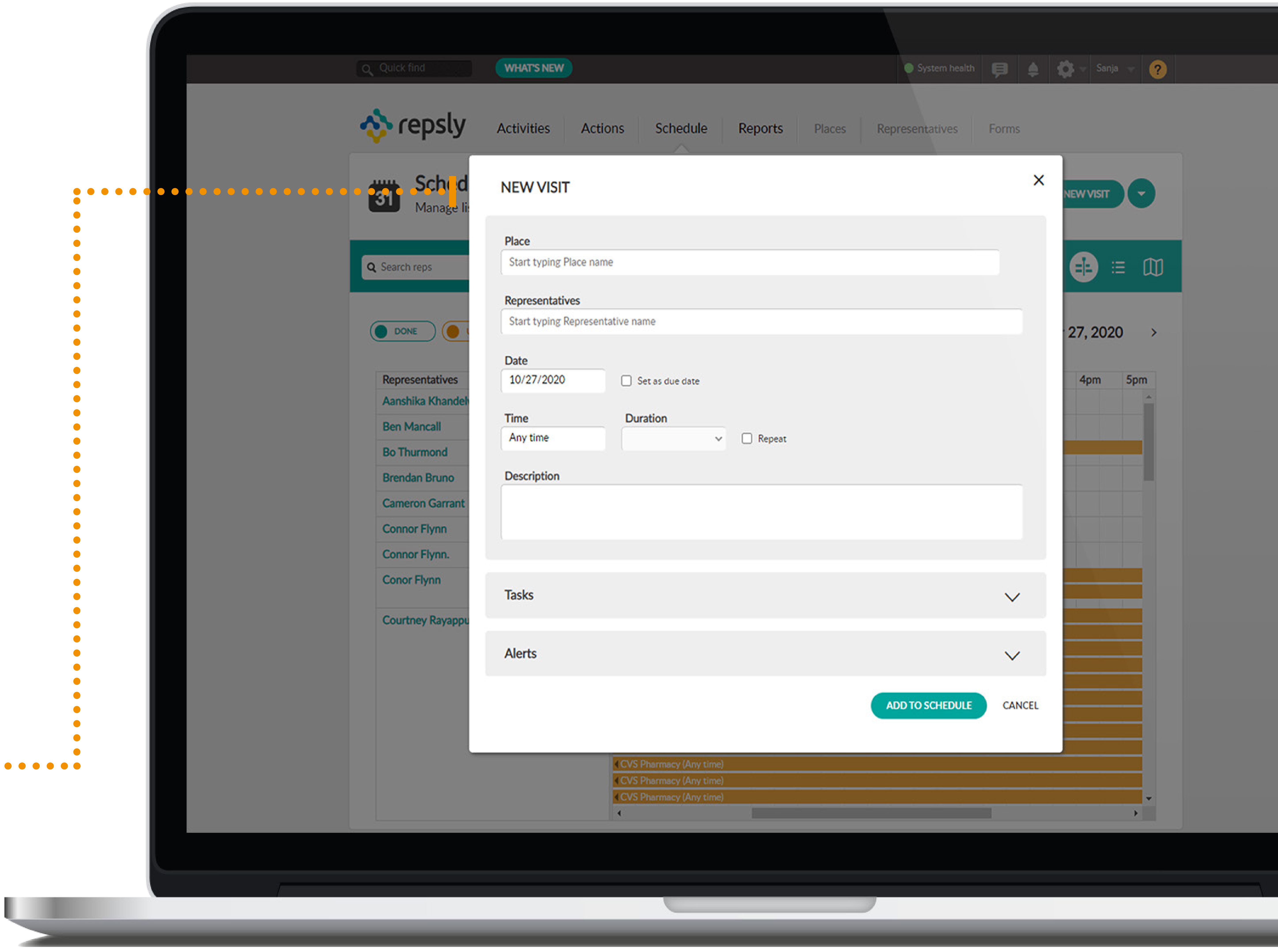
HOW TO SCHEDULE A VISIT WITH A DUE DATE?

With this feature available, a manager can field a call and immediately create an event in the schedule that allows the reps to make the necessary visits.

1. Click on **Schedule tab**.

2. Click on **New visit** to schedule a New Visit.

3. You can choose a **Due date** and select ‘Set as due date’ and that visit will be visible to representatives every day up to that date.



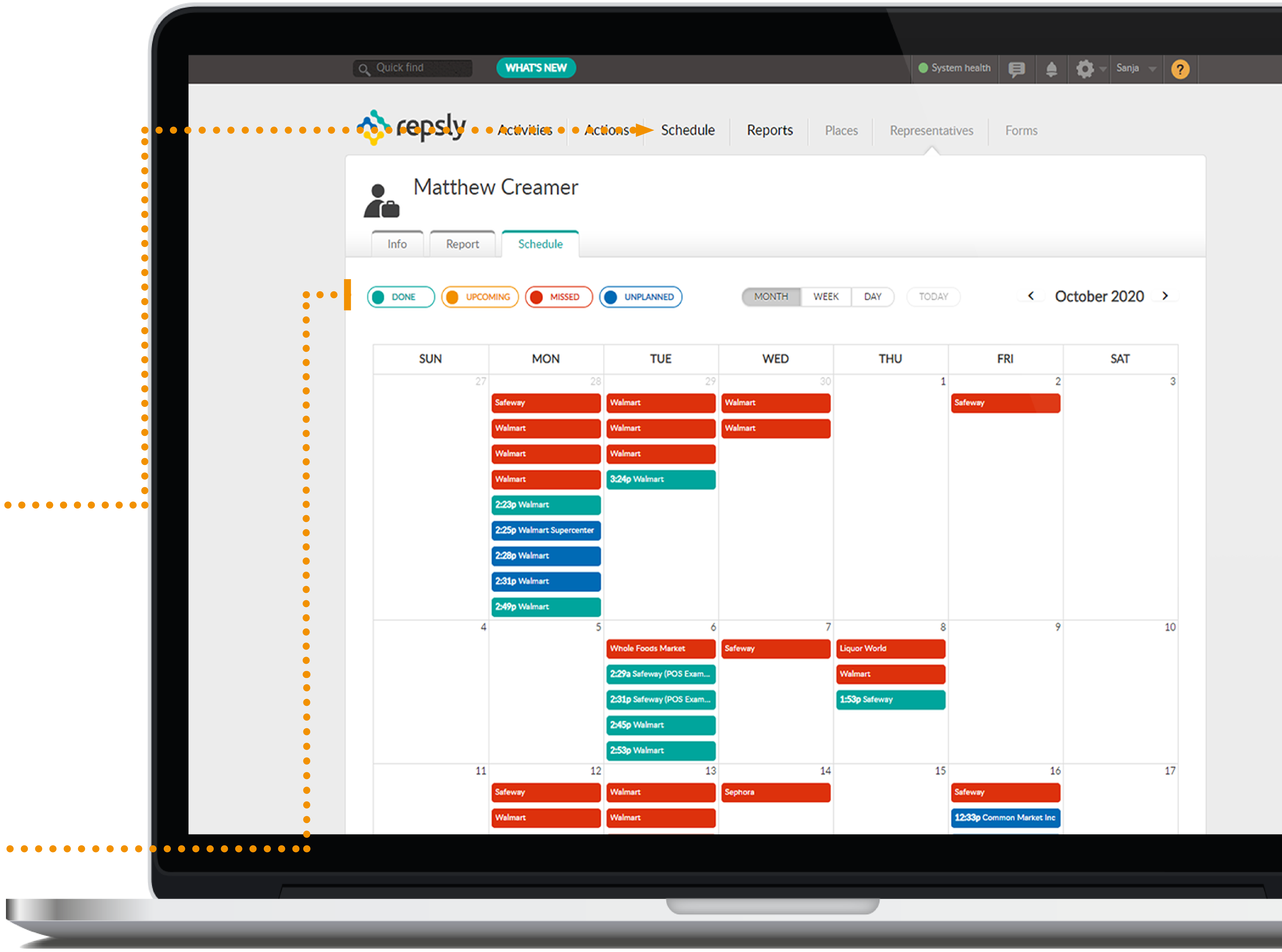
HOW TO SEE SCHEDULE STATUSES?

The Calendar function allows you to see places that have been visited as Done, scheduled Visits not yet completed as Upcoming, missed visits as Missed and unscheduled visits that have been made as Unplanned.

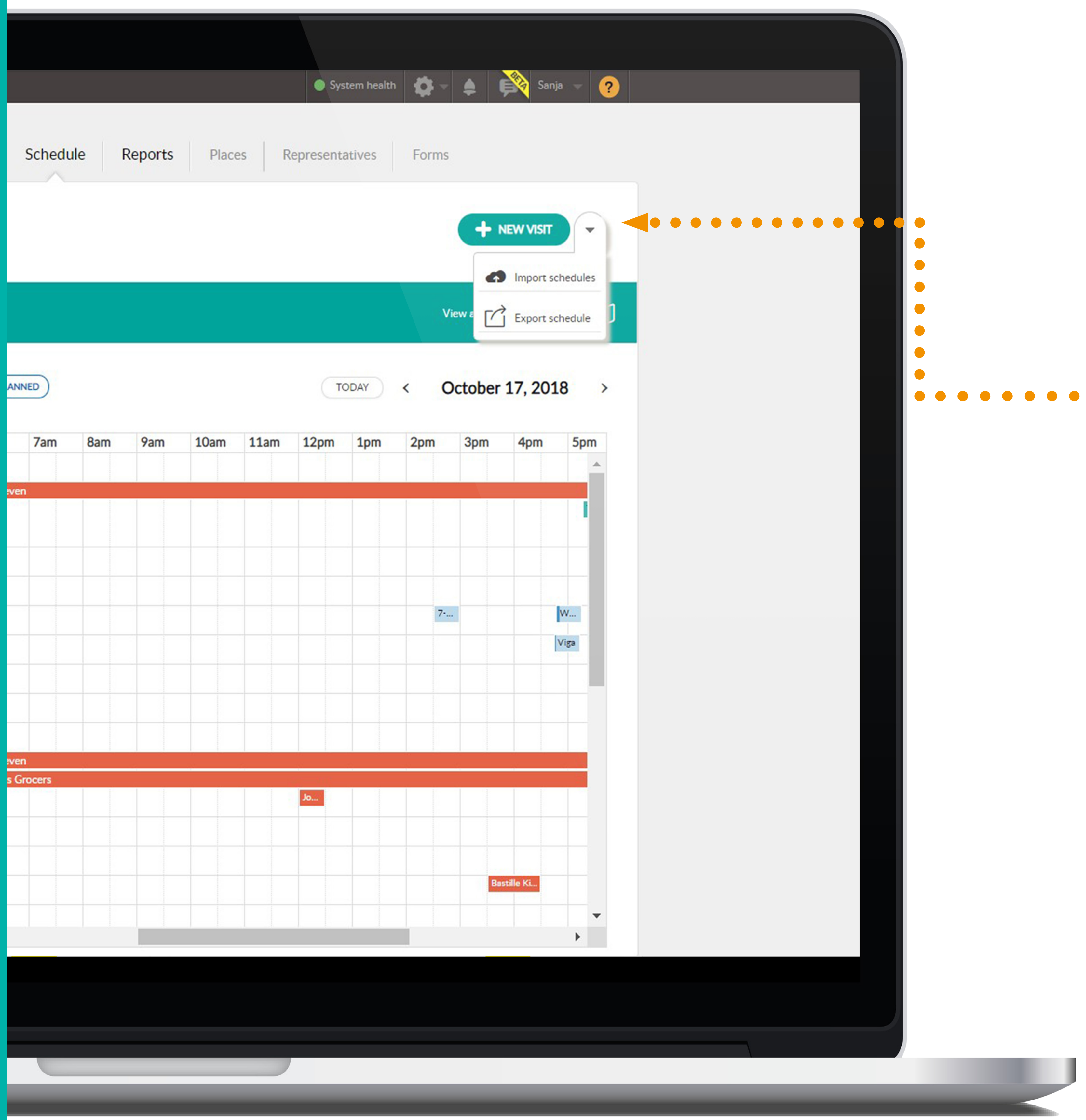
1. Click on the **Schedule tab**.

2. Select a **representative**.

3. Visits are marked:
Done (green)
Unplanned (blue)
Missed (red)
Upcoming (orange).



HOW TO IMPORT SCHEDULE?

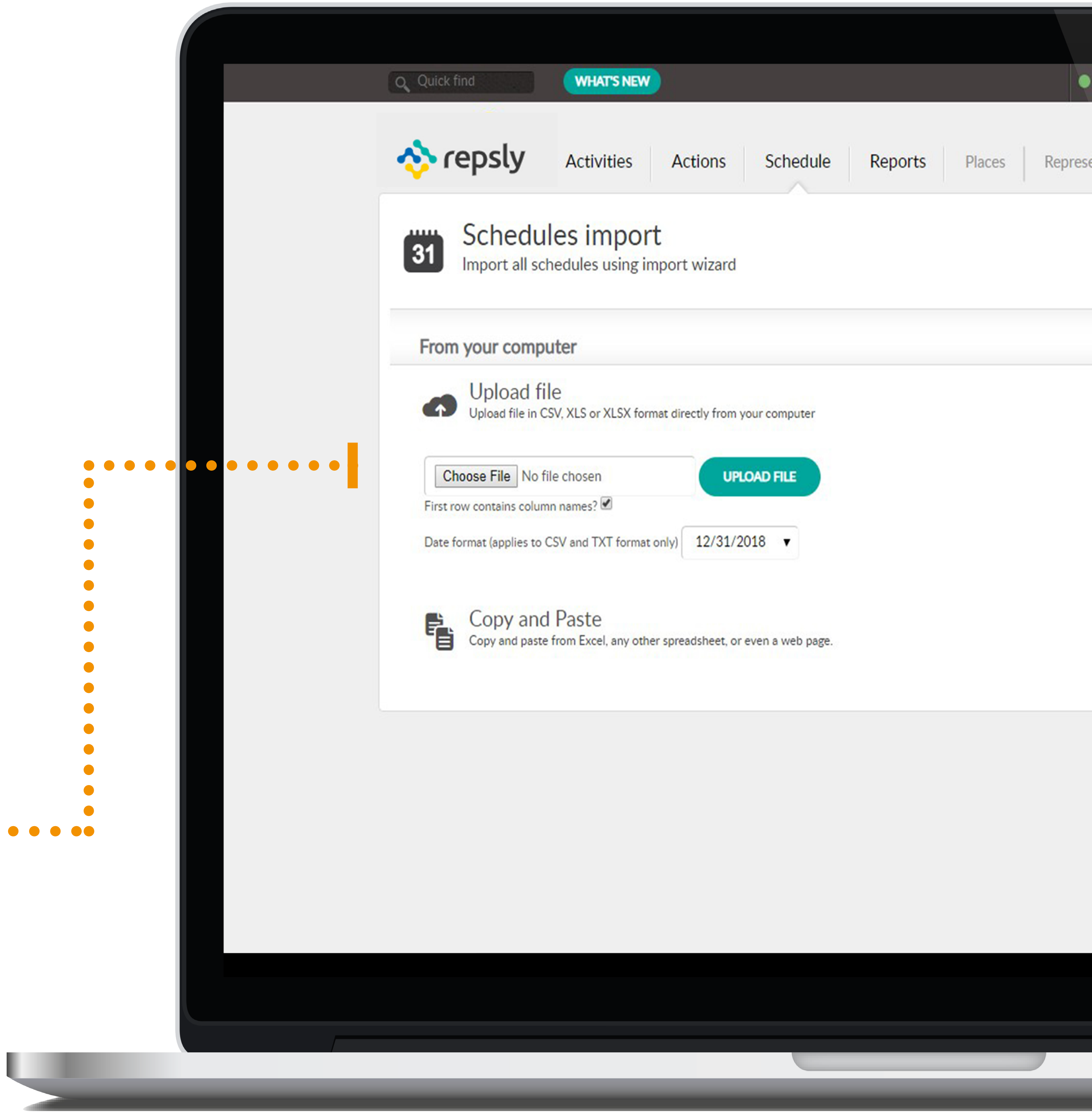


To make our app even more practical and to make it faster and easier for you to create and manage data we have our Import function that allows you to create the data in Excel and then import it into Repsly.

1 Click on Schedule and then click on the inverted triangle next to the new visit button. This will reveal the Import Schedule tab.

2 You will now have two options for importing your schedule. If you'd like to upload an excel sheet, click on the upload file button and choose the document you'd like to upload.

3 If you'd like to copy and paste your schedule in Repsly, first press the copy and paste button. Then, copy and paste your schedule into the field provided. To complete this action press continue and your schedule will be uploaded.



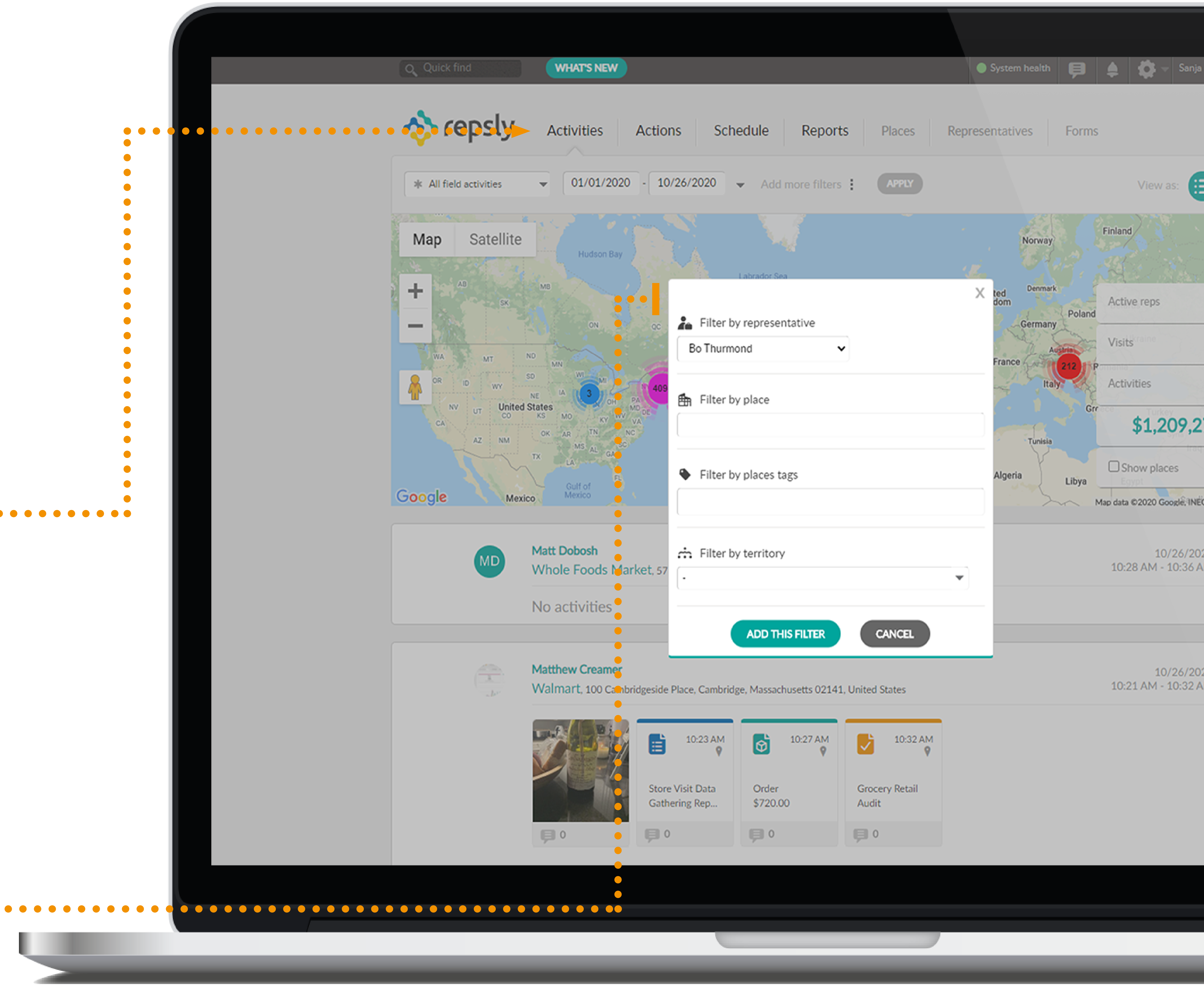
HOW TO SEE PHOTOS IN GALLERY VIEW?

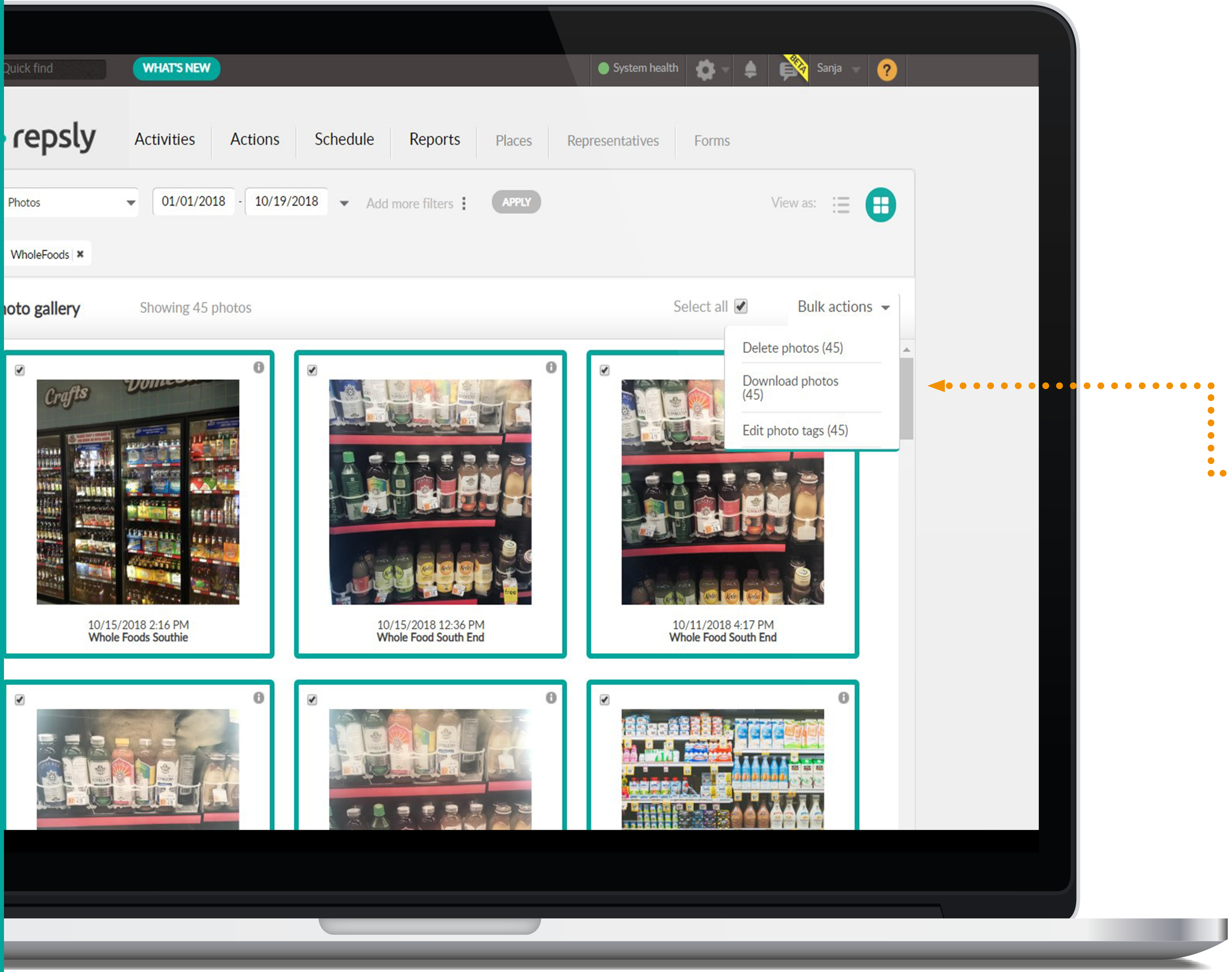
Gallery view allows you to see the details of a photo such as the name of the rep, time the photo was taken, name of the client, a download function and the ability to view the location of the photo on the map.

1. Click on the **Activities Tab**.

2. From your home page, select the **Activity filter**, and choose the Photos option, and optionally select your date range. Click **Apply**.

3. Click on **Gallery view**, Add more filters to filter by Photo tags if needed and select All photos or choose individual Photos to download.





4

Next, click on **bulk actions** and choose to **download photos**.

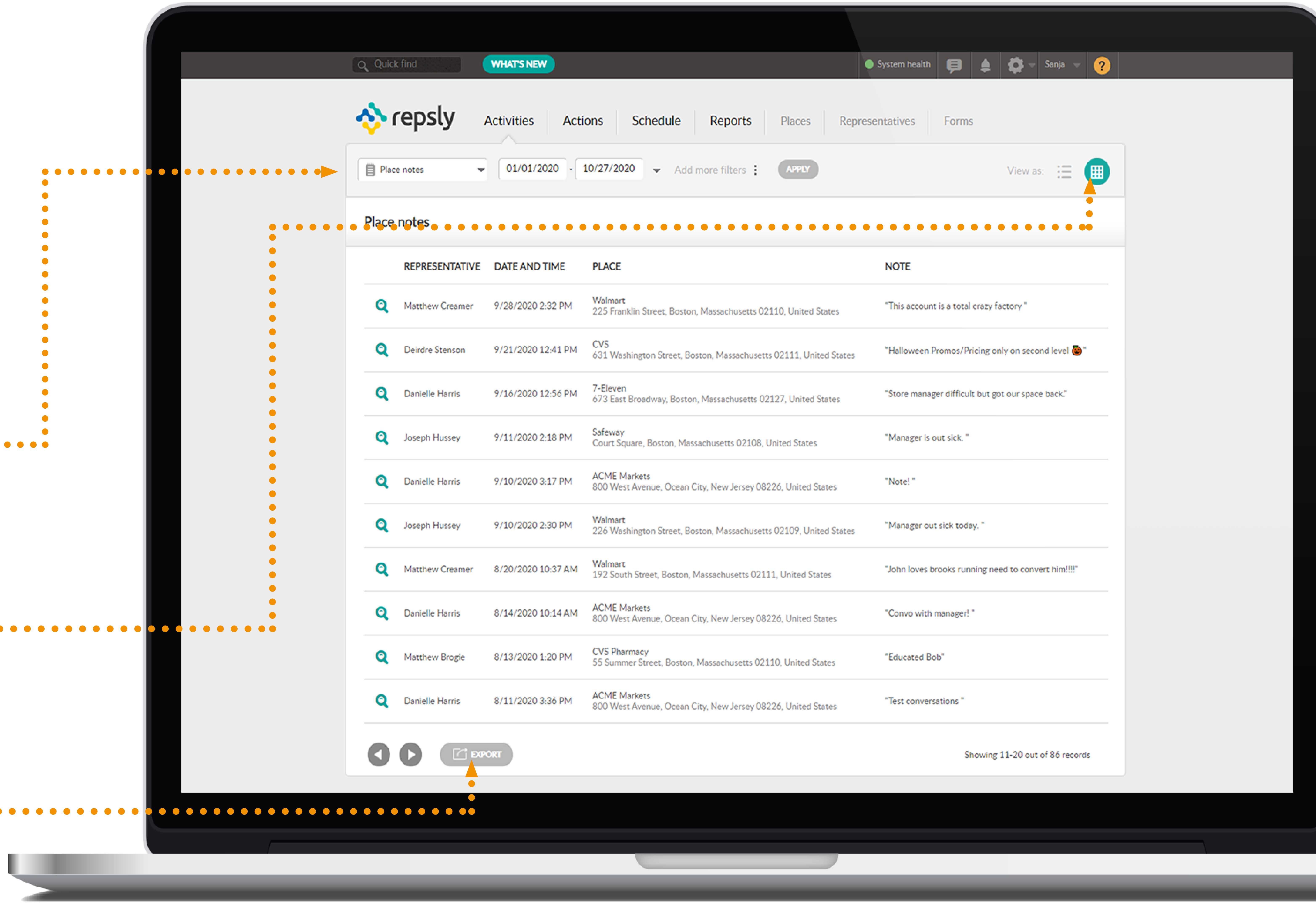
HOW TO EXPORT NOTES?

Exporting data from Repsly allow your Management to further analyze information gathered by field representatives.

1 On the Main page click on the **Activity filter** and choose **Place notes**.

2 Click on the **Tabular view** icon to see the place notes of the forms in the tabular style.

3 Click on the **Export button** at the bottom of the list. Choose an Export option: Excel spreadsheet or .csv file. Click **OK** and the file will be downloaded to your PC.

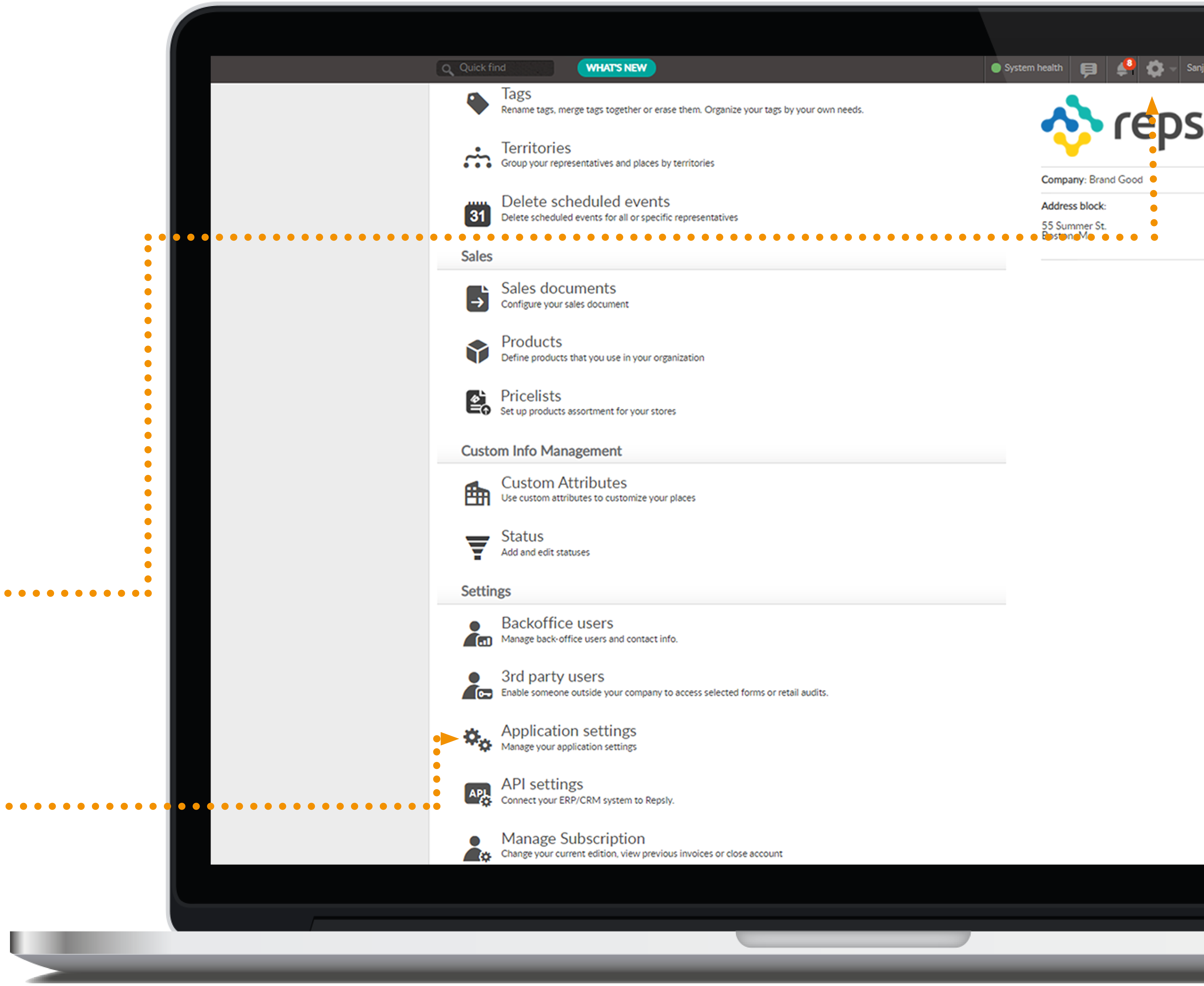


HOW TO ENABLE DISCOUNTS FOR ORDERS?

In Repsly you can choose between three options for discounts: Order items and order total, Only order total or Nothing. You can select the option you'd like to have in your account.

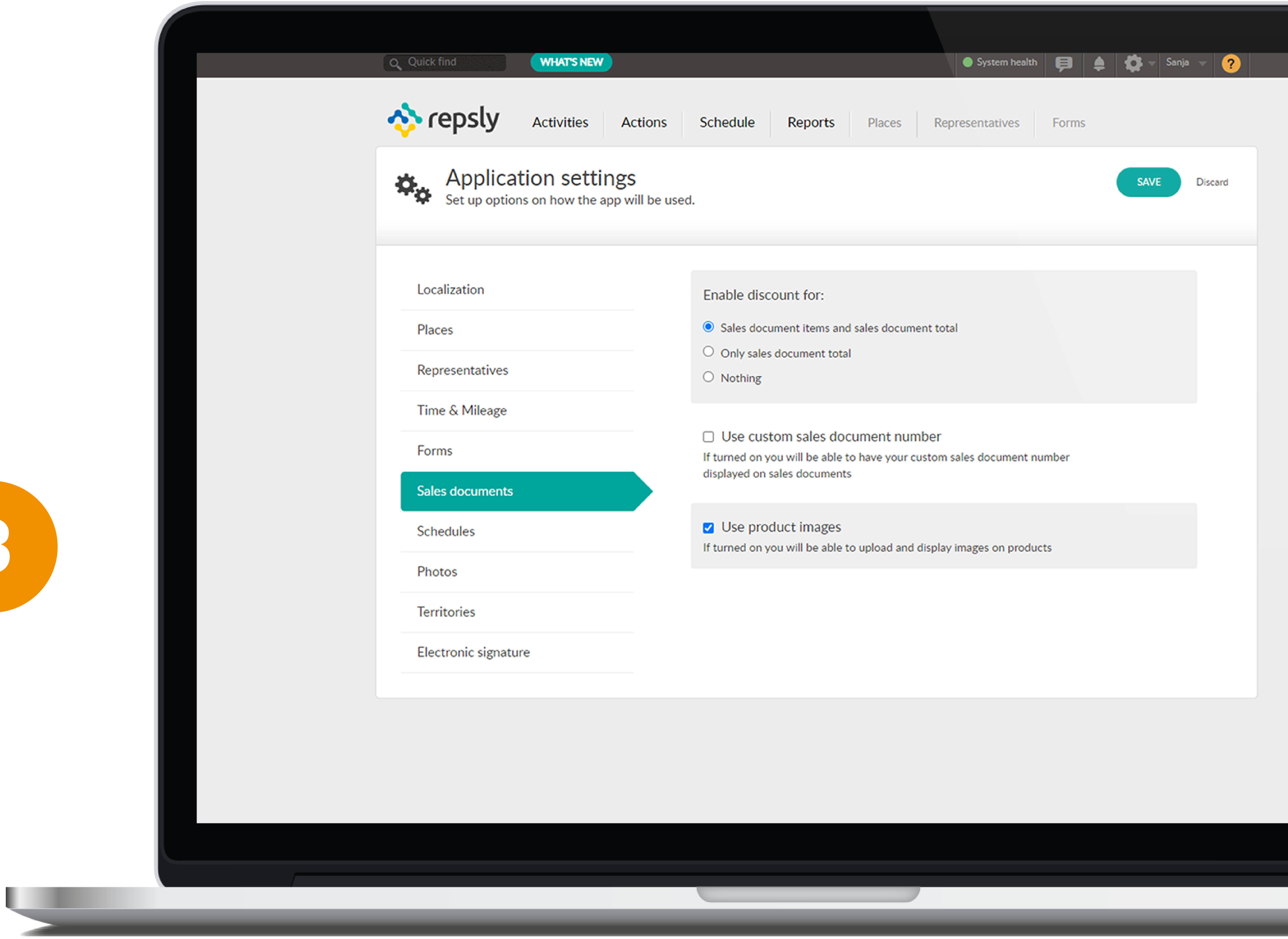
1 Click on the **Gear Icon** and then click on **Settings**.

2 Click on **Application Settings**.



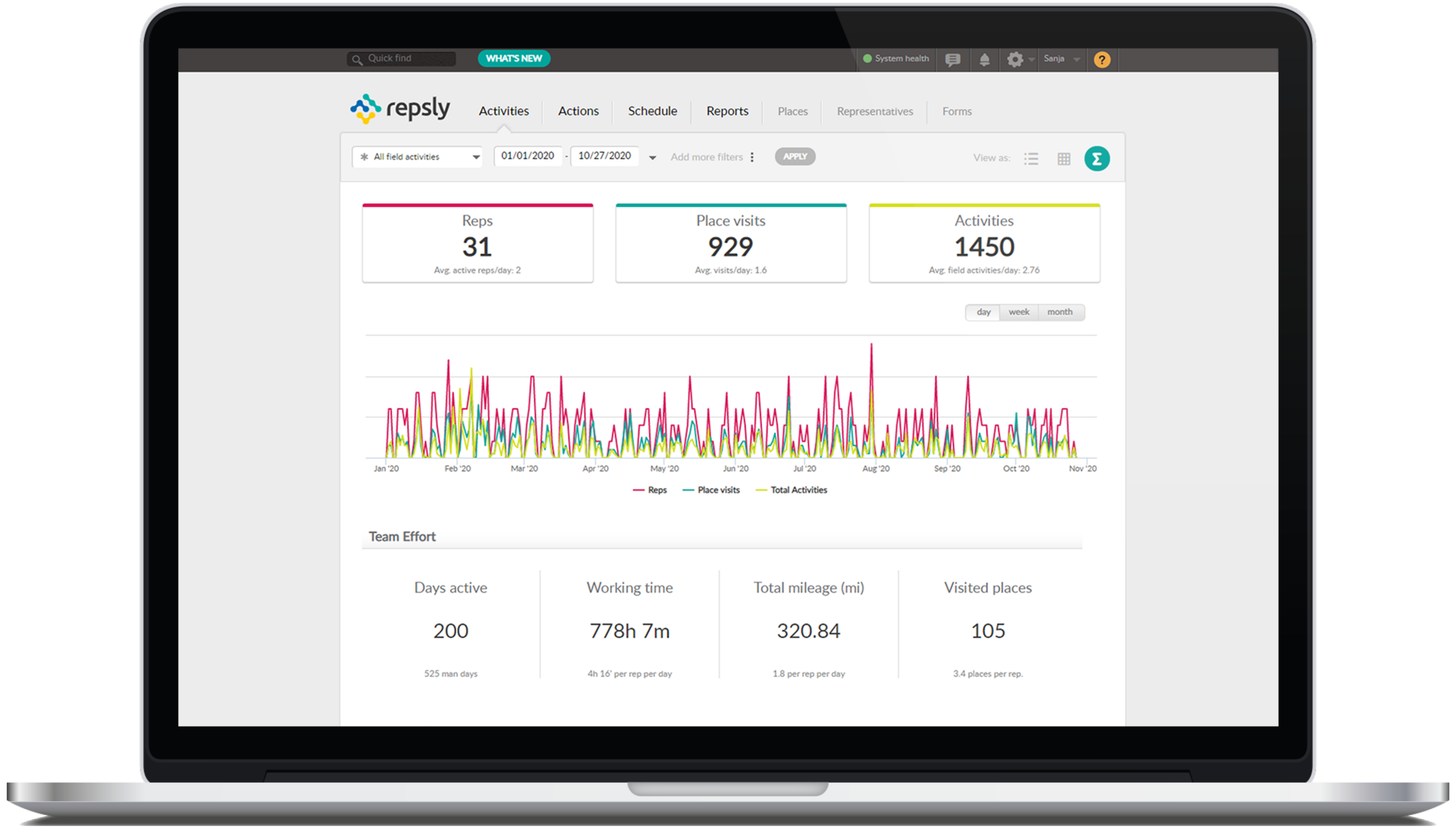
Click on the **Sales documents**. Here you will see 3 options for discounts : Order items and order total, Only order total or Nothing. Select the option you'd like to have and then press **save**.

3

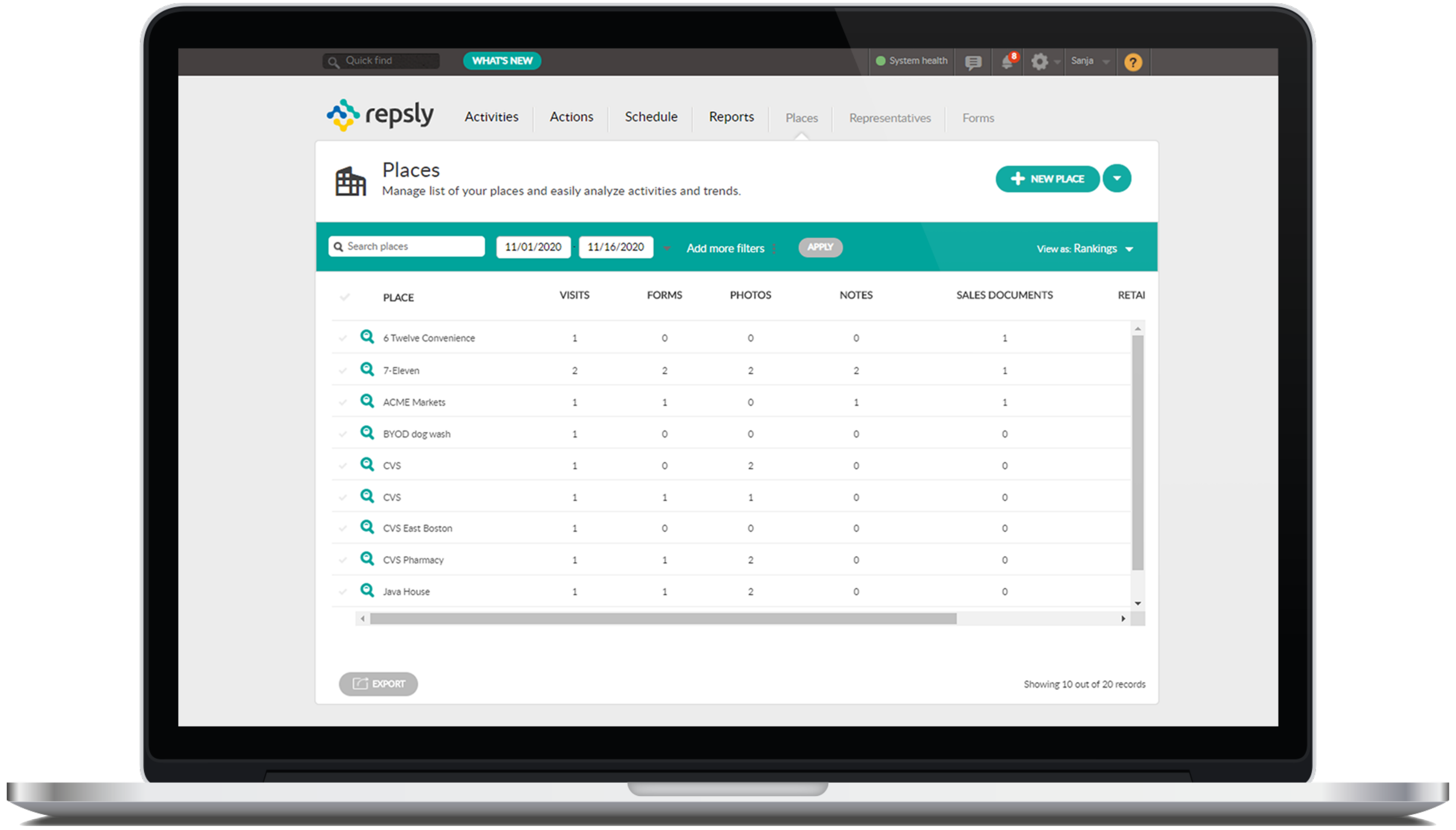


HOW TO VIEW REPORT?

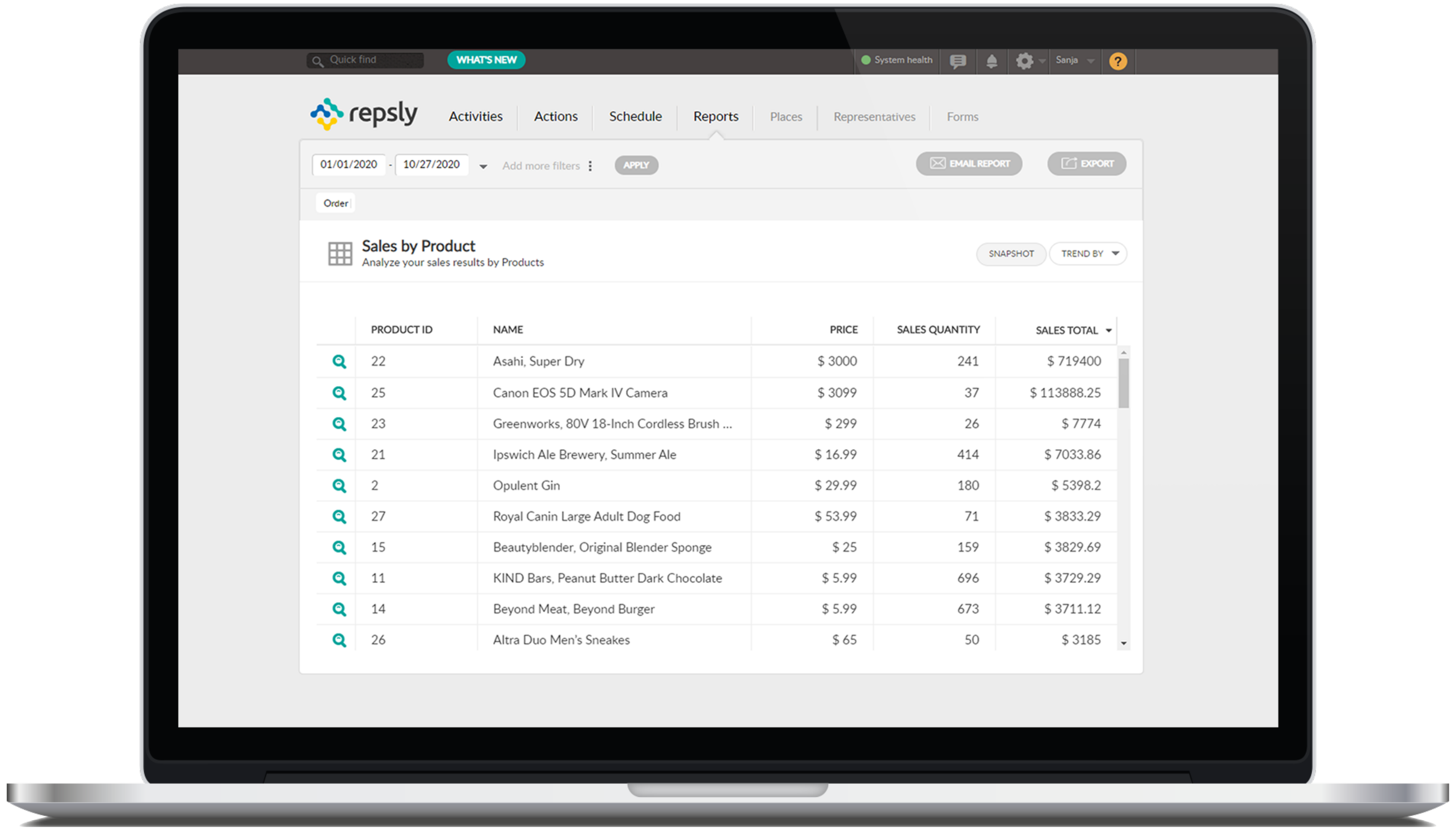
Repsly automatically turns the data your team collects in the field into flexible, digestible. The Reports Tab helps managers visualize their data through real-time trend analysis.



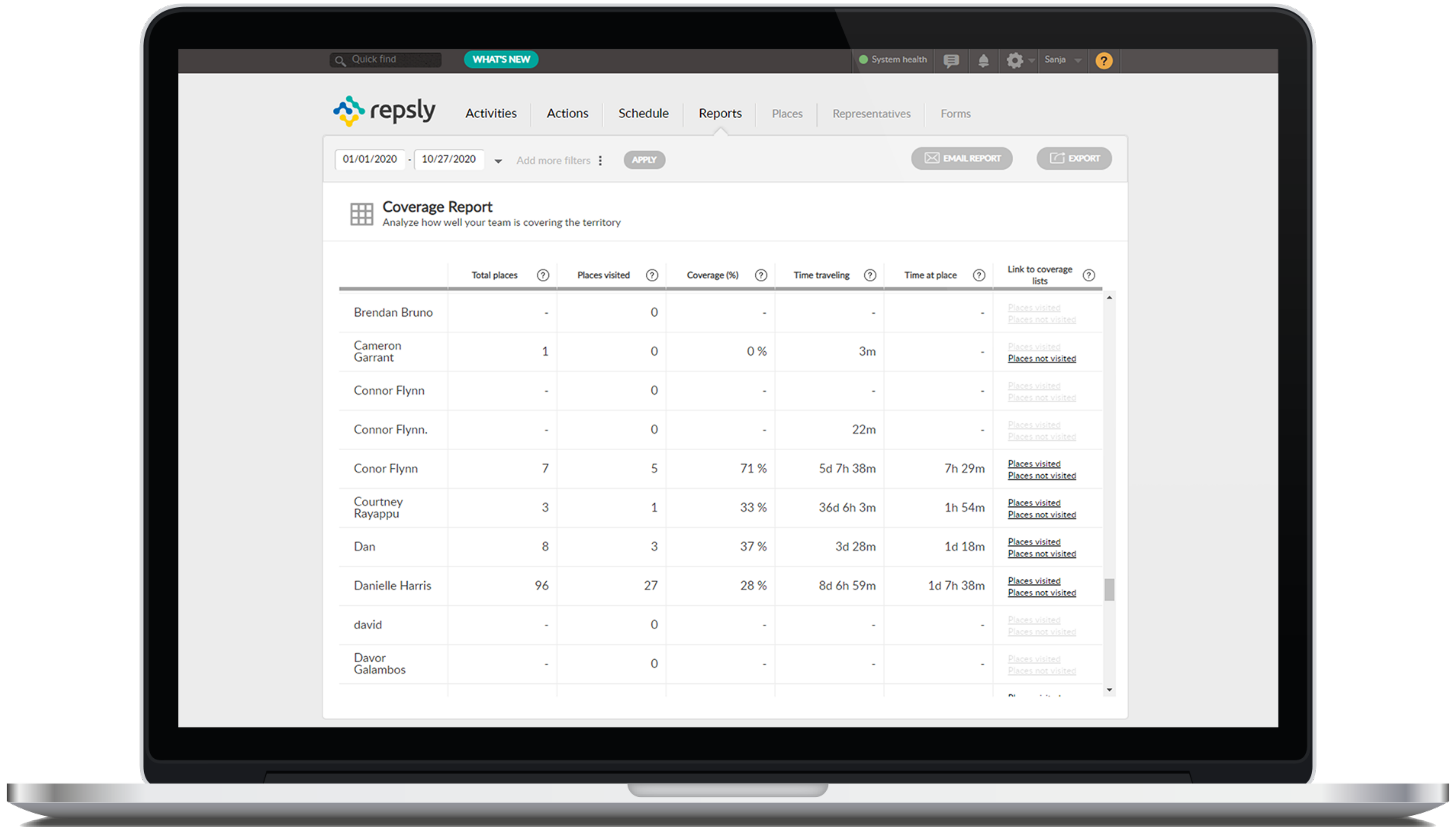
***Summary Report**: gives a high-level overview of reps activities over a period of time .*



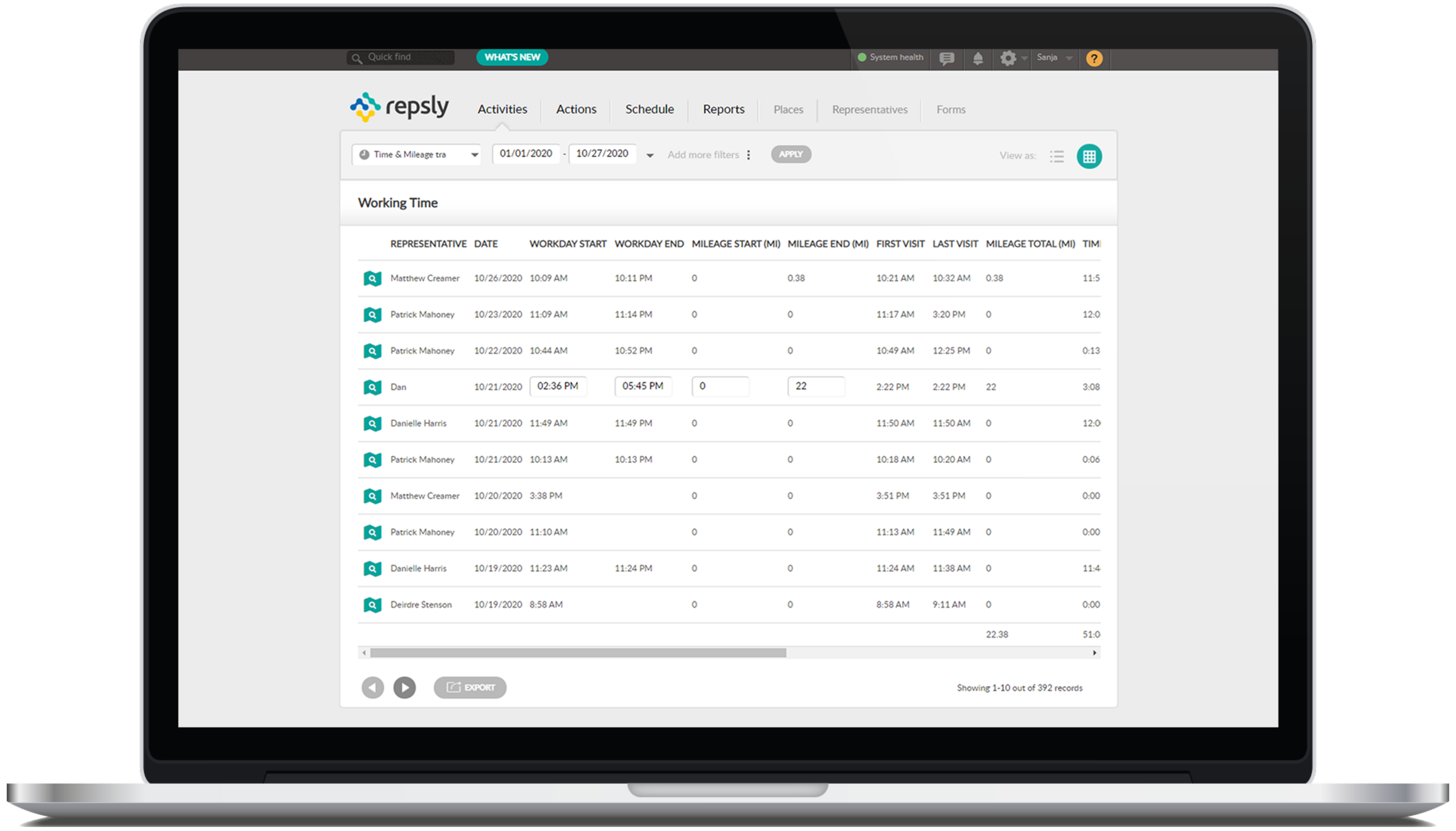
***Rankings Report**: can be seen for both place and reps. The purpose of this report is to rank your reps or places by activity.*



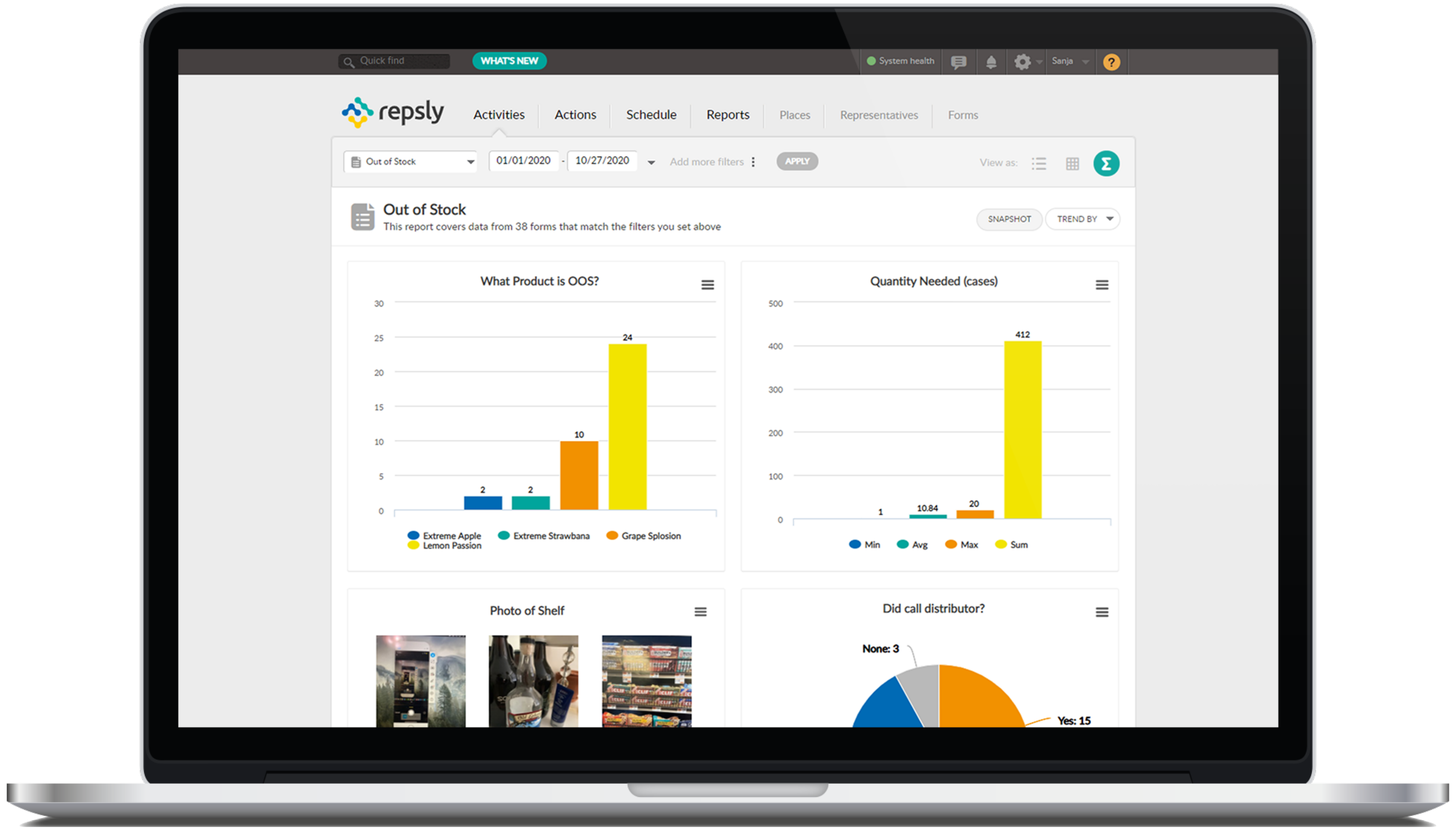
***Sales Report**: this is a sales report by each product*



***Coverage Report**: this report will analyze how well your team is covering your territory*



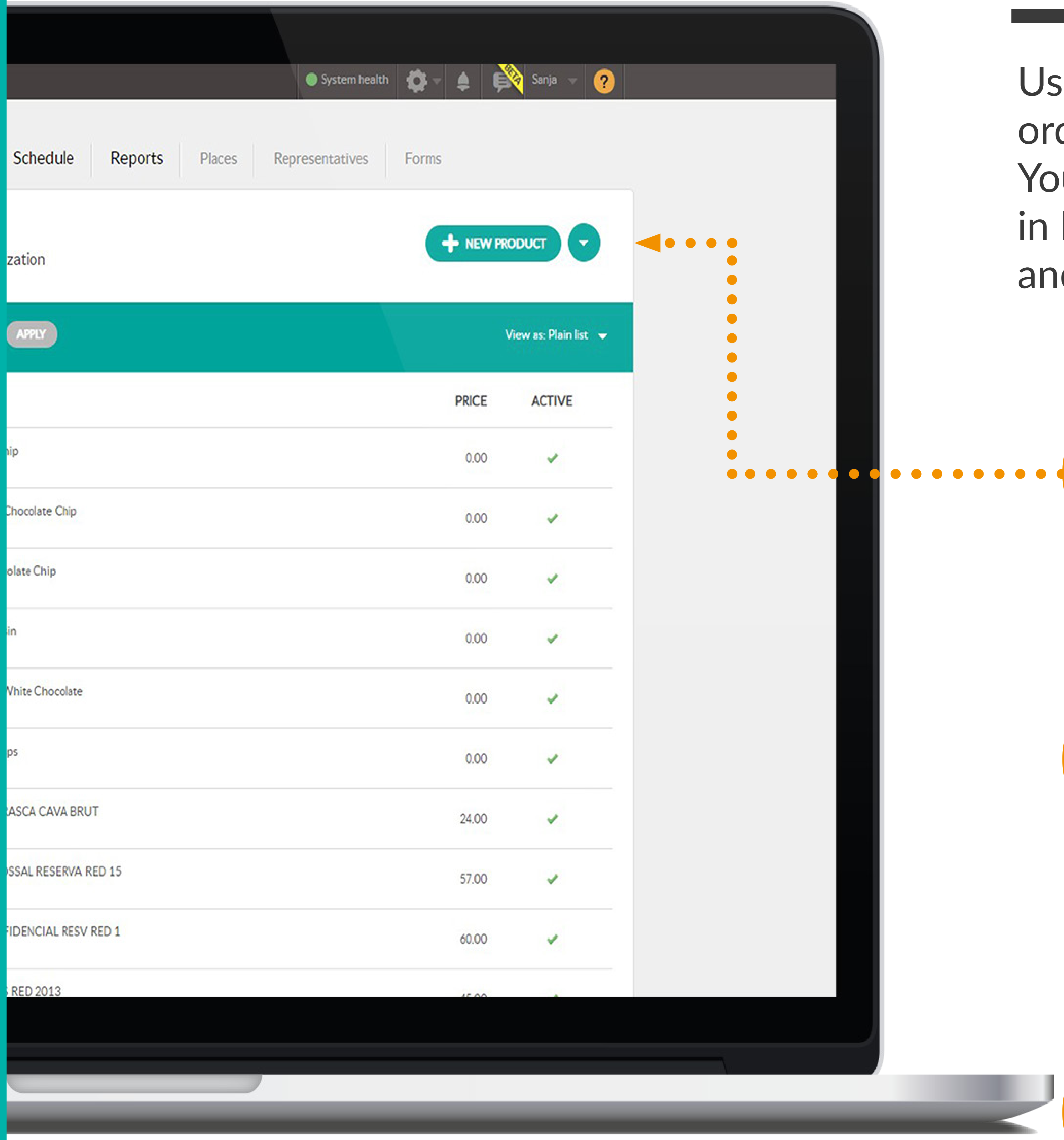
***Time and tracking**: this report will show you your Reps time and mileage.*



***Form reports**: different question types will provide reports.*

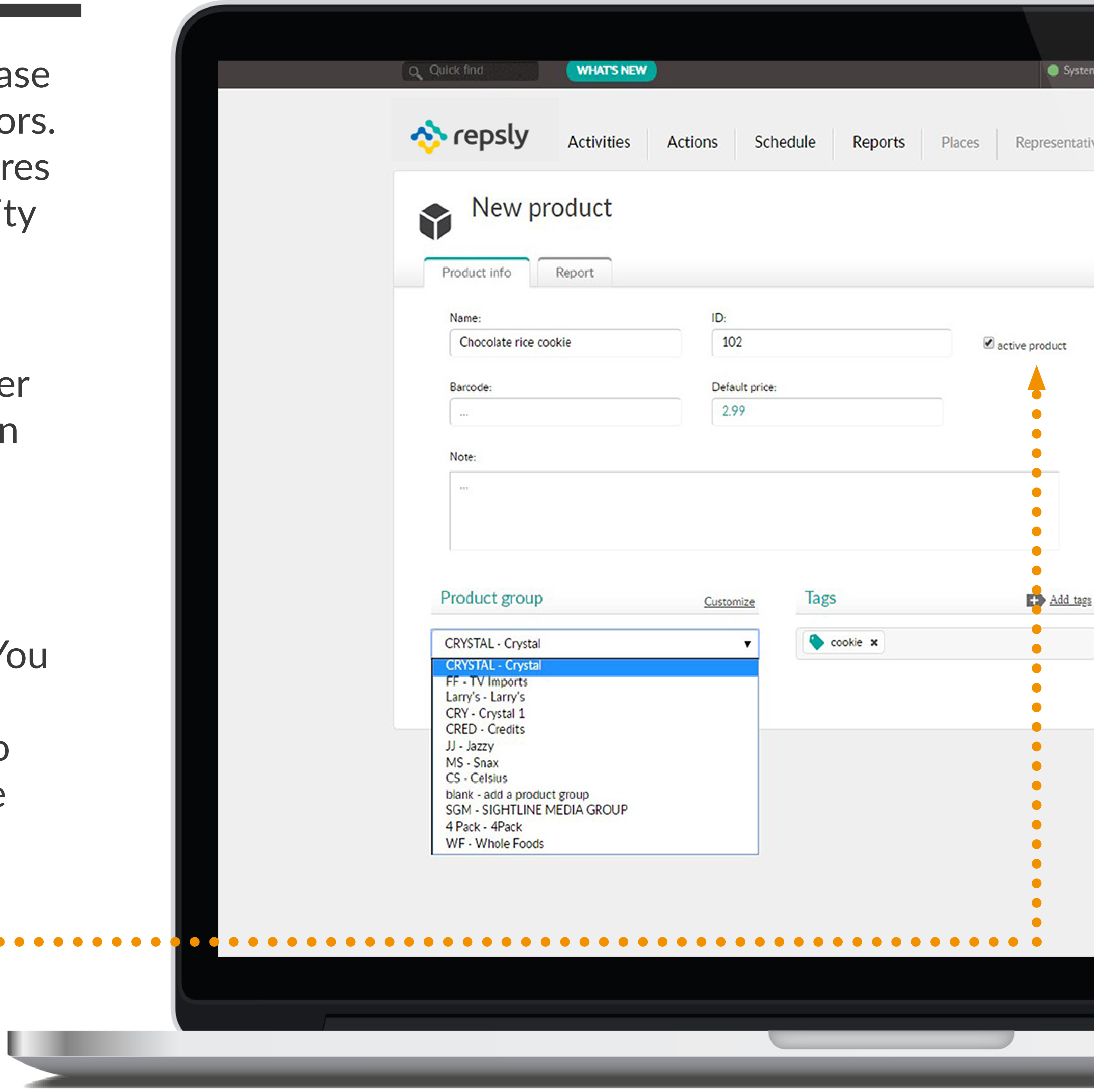
HOW TO ENTER PRODUCTS IN ACCOUNT?

Using products in Repsly allows your reps to fill out purchase orders easier and faster, while reducing the amount of errors. Your reps will be able to use the product monitoring features in Repsly to monitor prices, out of stock, product availability and much more.



1 Click on the **Gear Icon**, located on the upper right hand corner. Select **Products** and then click the **New Product button**.

2 Enter all mandatory data for this product. You will also need to assign each product to a product group, which you can customize to organize the products, however, makes the most sense for your business.



3 Make sure the product is marked as "*active product*". Click **Save**.

HOW TO USE RETAIL AUDITS?

Retail Audits allow you to collect and answer questions about your products in the store.

Click on the **Gear Icon**, located on the upper right hand corner. Select **Retail Audits** and then click the **New Retail Audit** button.

1

Give the Retail Audit a name. Some fields are already built-in, but you can also add specific custom questions, that you want your reps to answer in regard to your products.

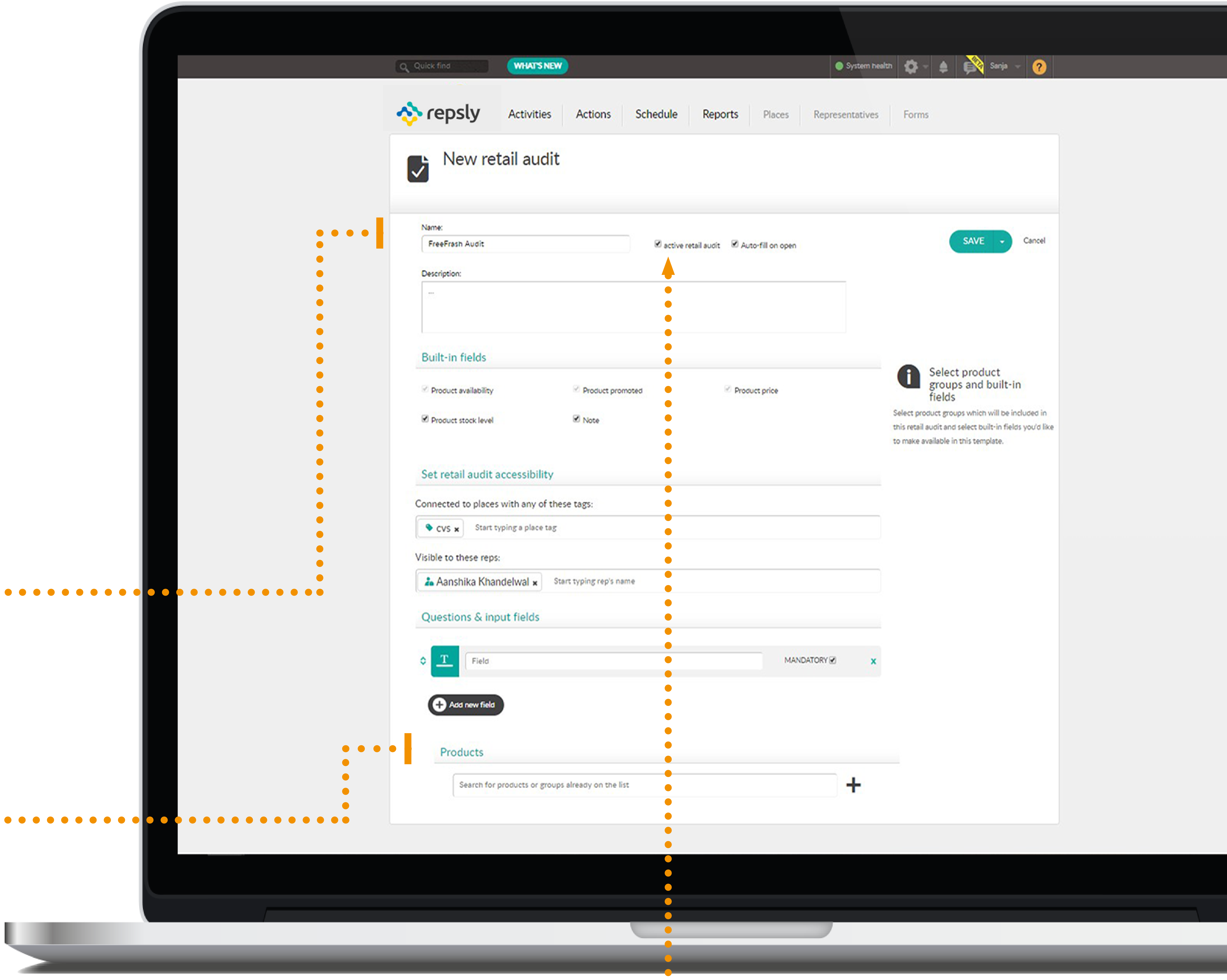
2

Assign the audit to the individual products, and/or the entire product group(s). You can do this by clicking on the + sign next to the product line.

3

Make sure the Retail Audit is marked as **active**, then click **Save**.

4



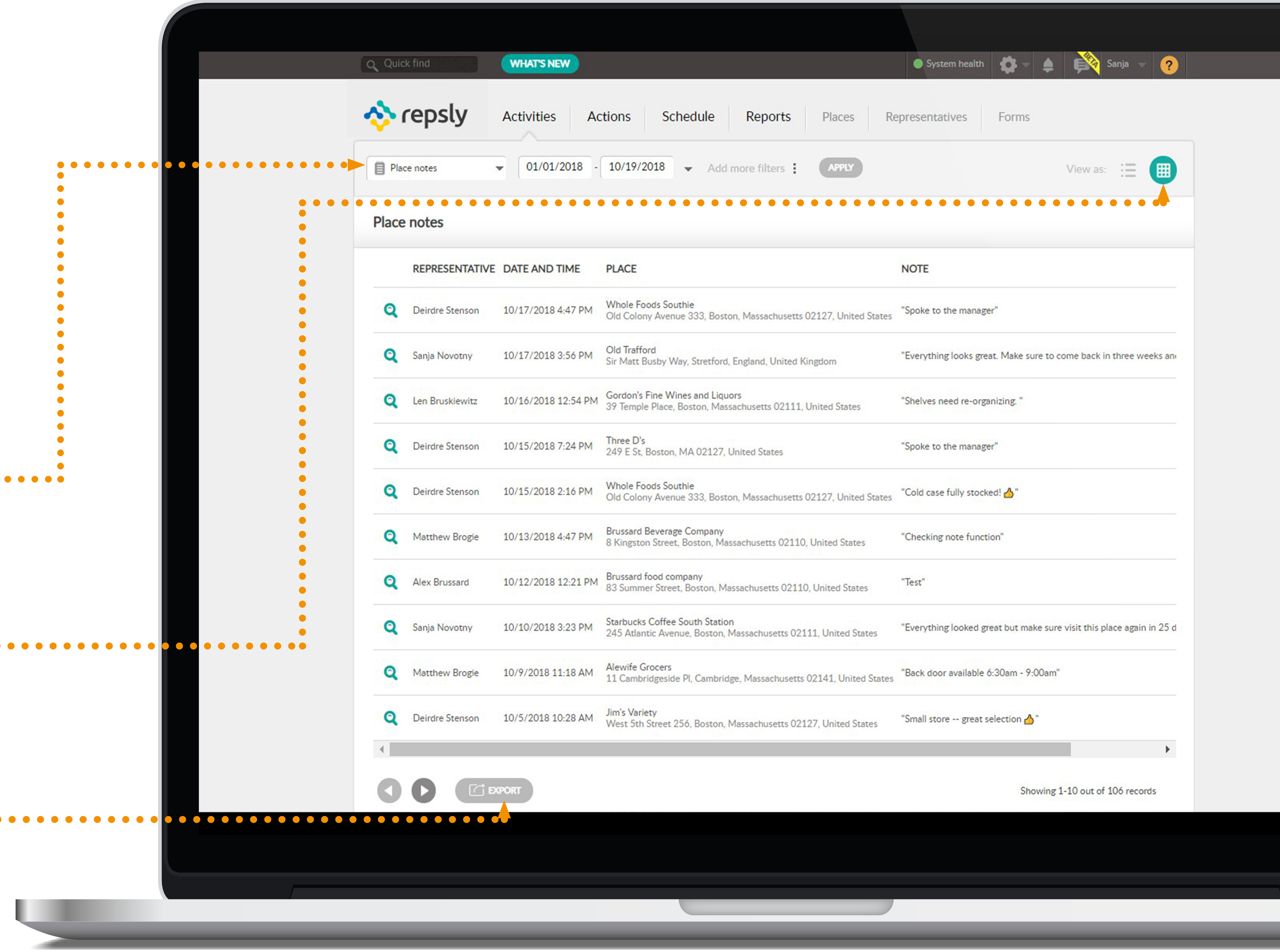
HOW TO USE ACTIVITIES TAB?

Exporting data from Repsly allow your Management to further analyze information gathered by field representatives.

1. On the Main page click on the **Activity filter** and choose **Place notes**.

2. Click on the **Tabular view** icon to see the place notes of the forms in the tabular style.

3. Click on the **Export button** at the bottom of the list. Choose an Export option: Excel spreadsheet or .csv file. Click **OK** and the file will be downloaded to your PC.



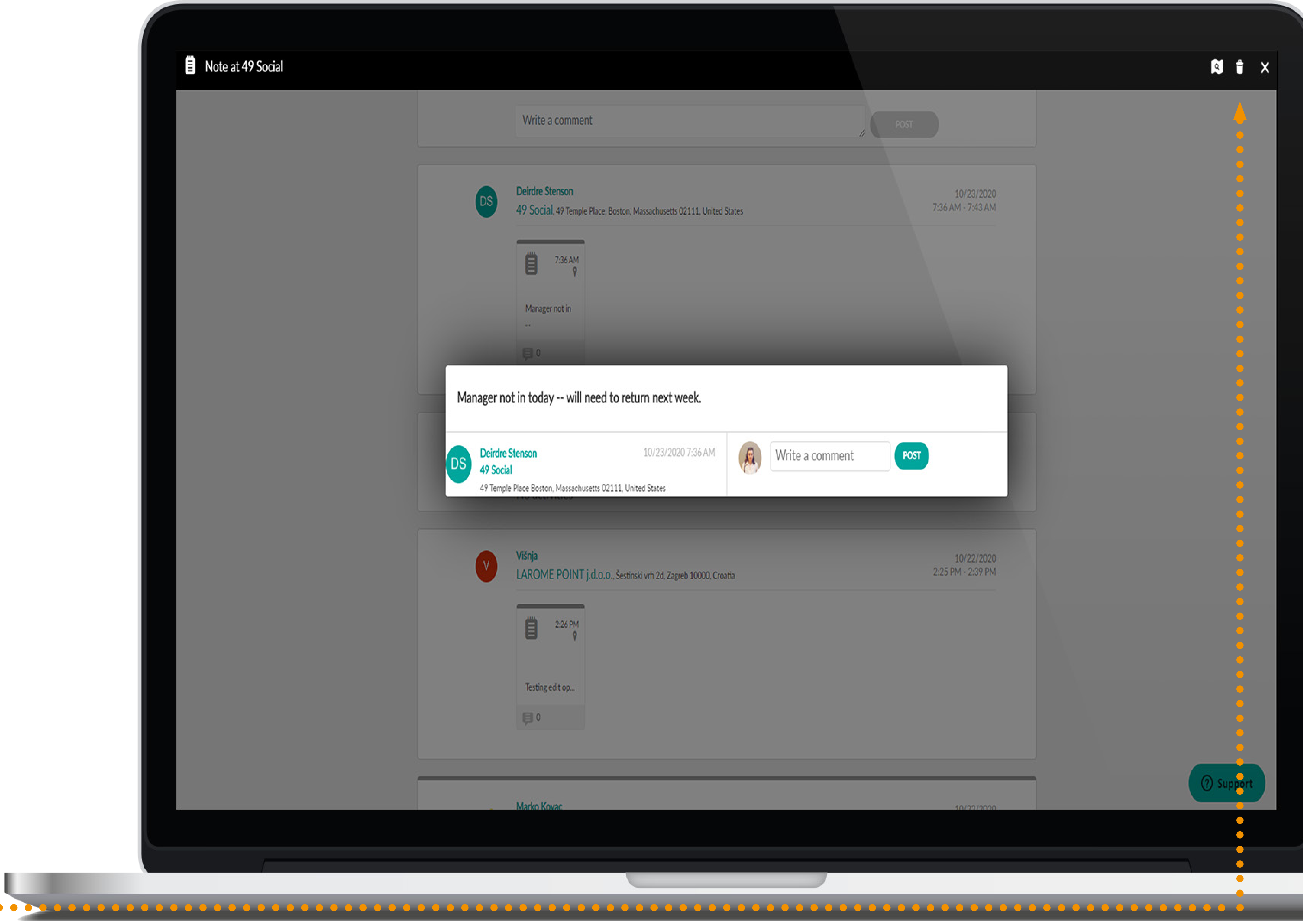
HOW TO DELETE AN ACTIVITY?

If you want to remove specific information from your submitted activities, you can do it manually from the Repsly web app as a Backoffice user with the appropriate permissions.

1. Click on the **Activities tab**. In your feed choose from your field activities the ones you want to delete. Use filters above the map to narrow your search criteria.

2. The **date filter** allows you to filter by date range. The Backoffice user can look at data for a specific day, week, month, or even year. The additional filters tab allows you to filter by a specific rep, place or territory.

3. You can **delete activities** by clicking on the activity and then clicking on the trash can icon in the top right corner.



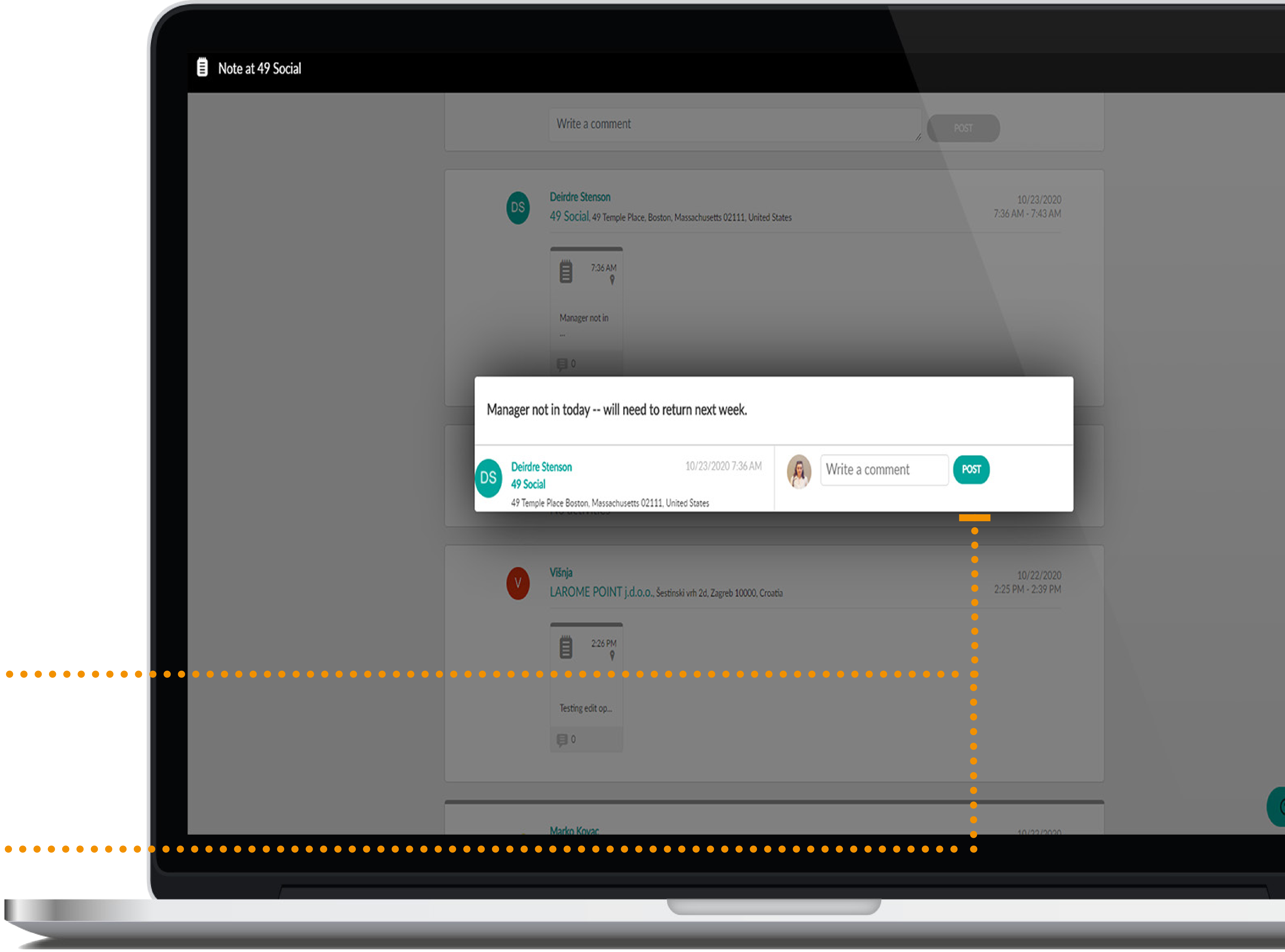
HOW TO COMMENT ON AN ACTIVITY?

Repsly provides management with the ability to comment directly on an activity that has occurred, allowing management to ask questions on specific activities that have just happened in the field.

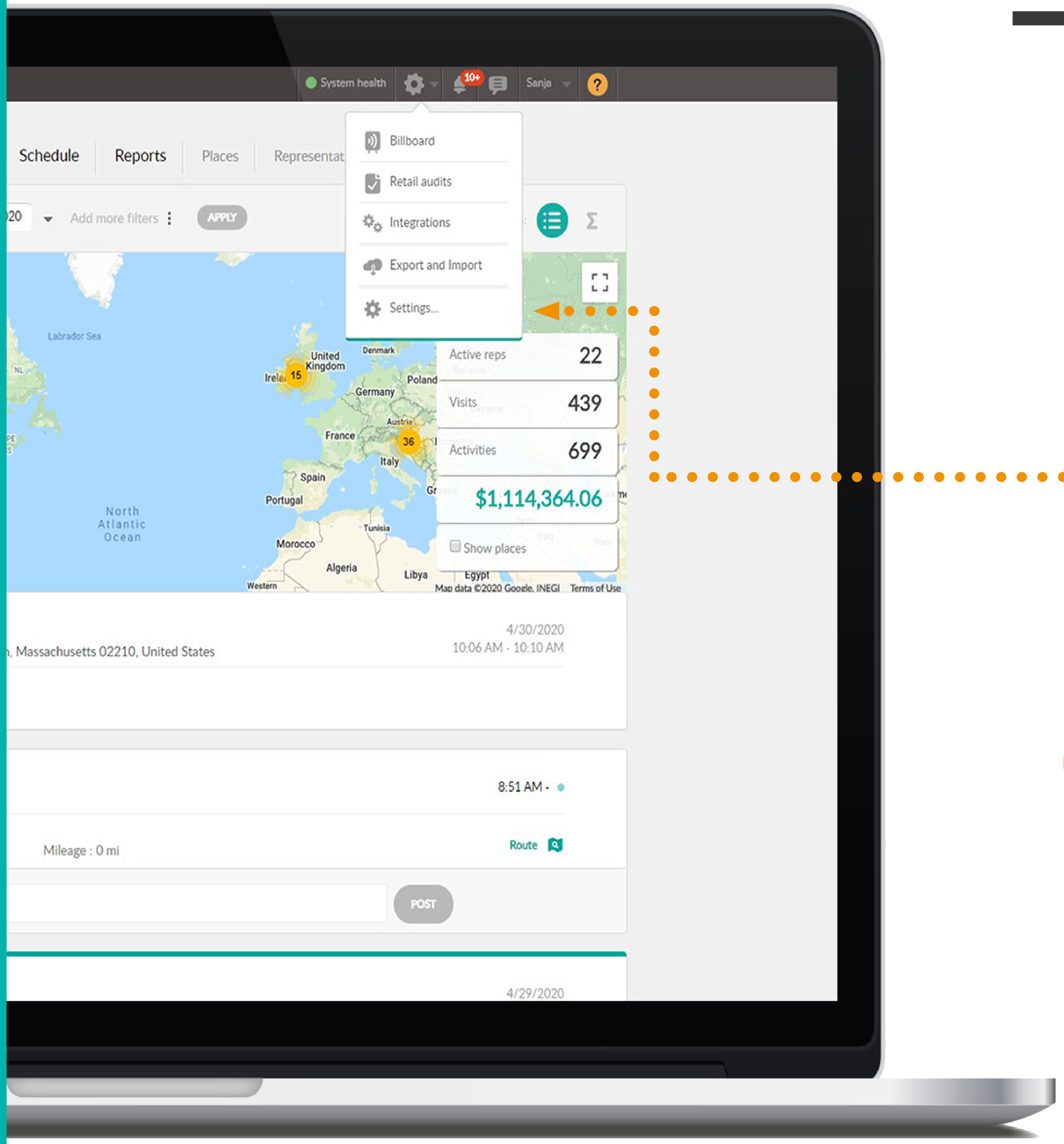
1. Click on the **Activities tab**.

2. Scroll down and select the activity you wish to comment on. Write your comment directly in the comment section on that activity.

3. Click **Post**. The rep who created the activity will receive a notification and they will be able to reply.

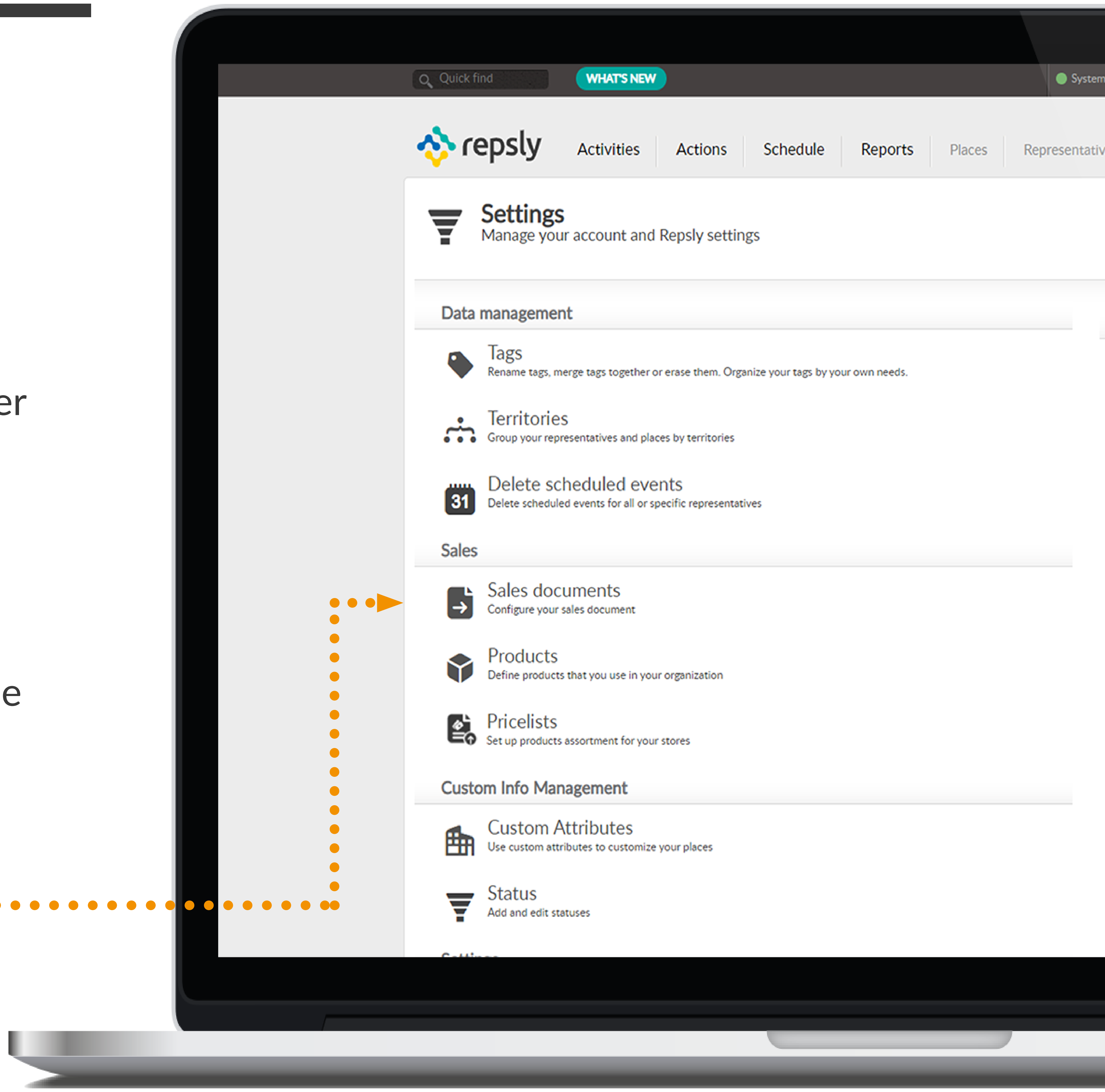


HOW TO CREATE YOUR SALES DOCUMENTS?



1. Click on the **Gear Icon**, located in the upper right-hand corner of the page and select **Settings**.

2. Now choose **Sales documents**. Click on the **New Sales Document** button.



3

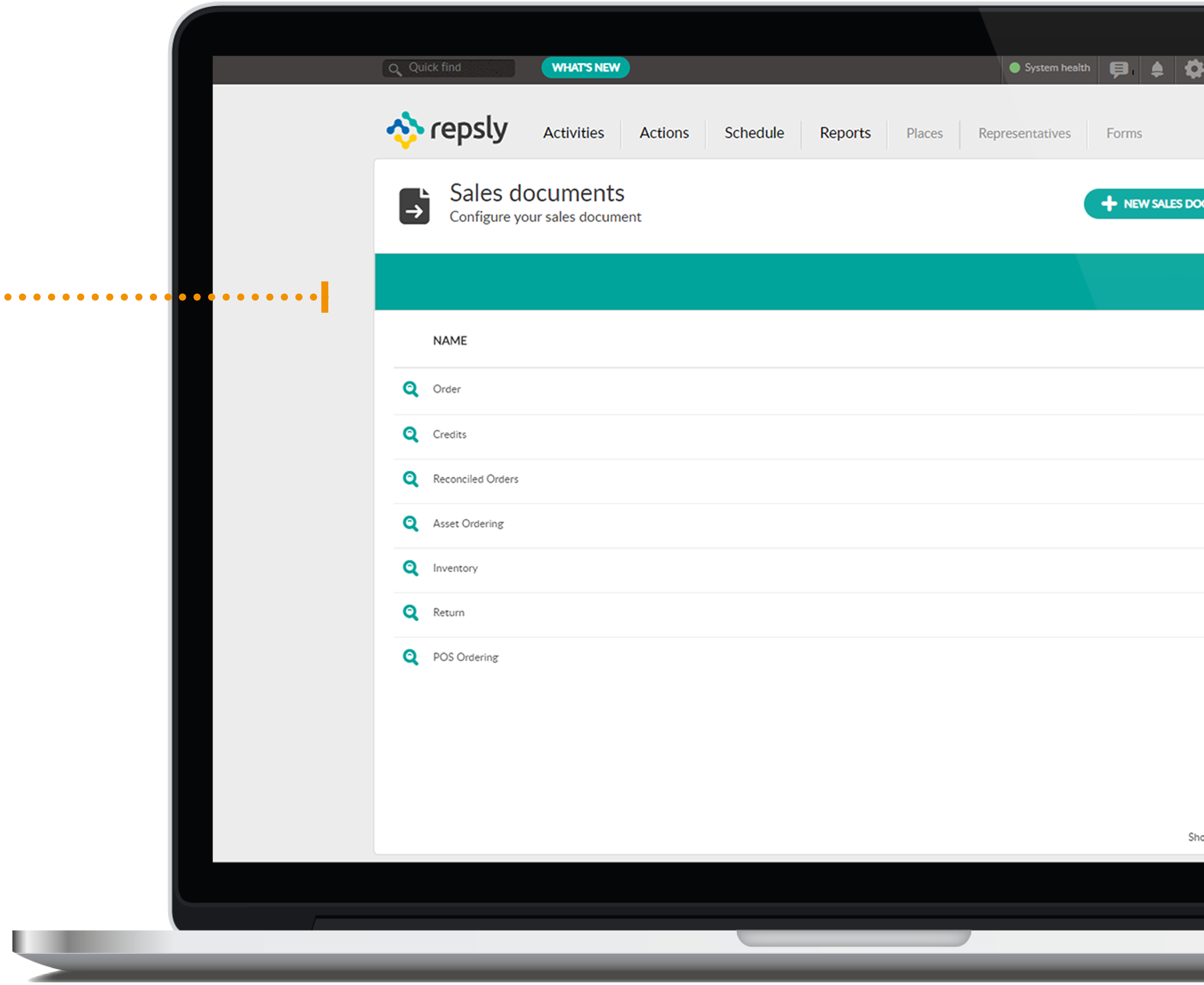
Once the document is open, you will be able to create a name and fill out the custom fields, tags and status.

Document statuses are used to track different status for an order. For example, you may want to track if an order was processed, received and shipped.

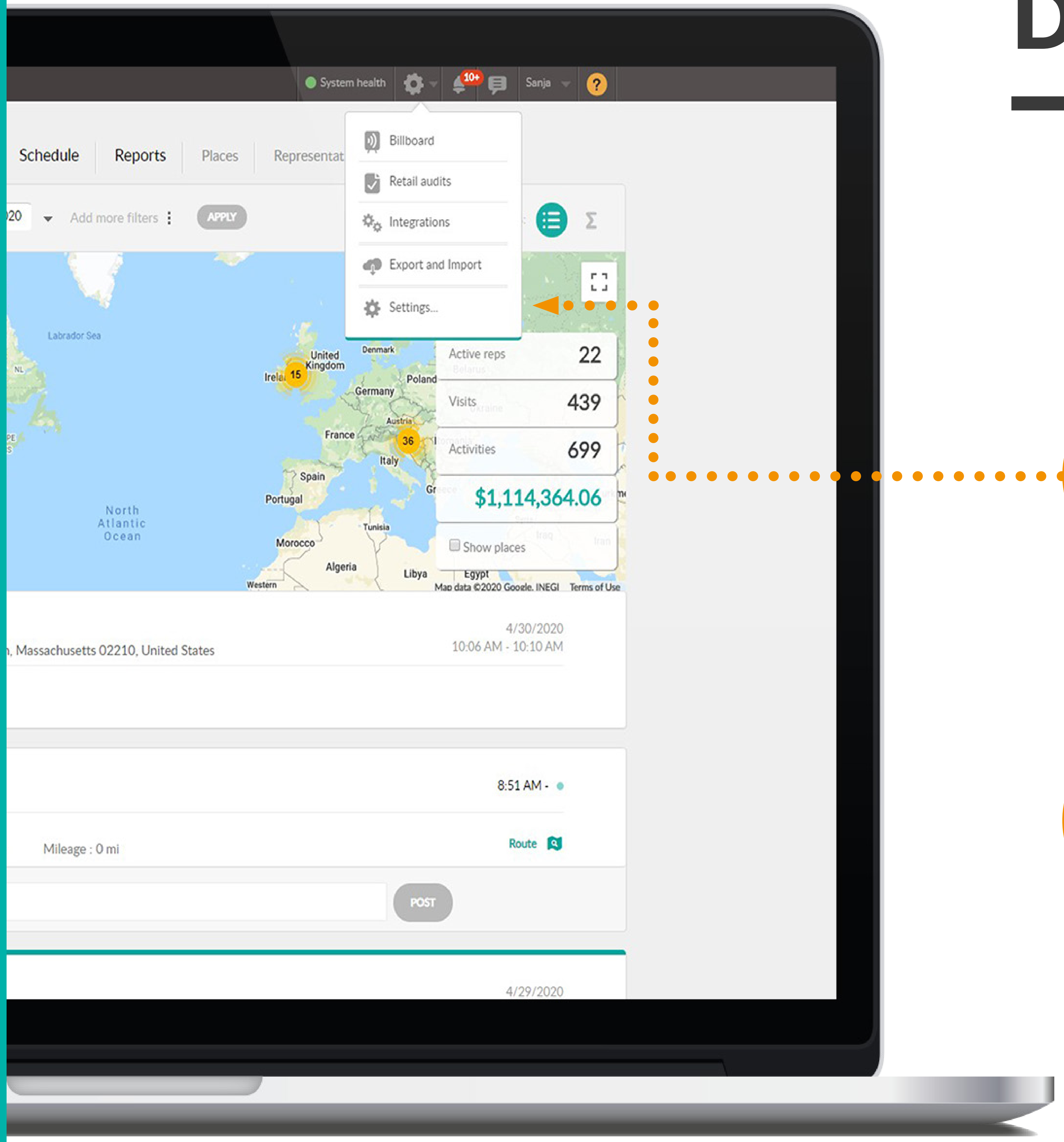
Document attributes are a flexible way to group products together on an order. For example, you want to have your field team to capture “Reason for Return” for each product by using Attributes.

4

Once you’re done with setting up your sales document, click on Save and make sure to mark the document as active.

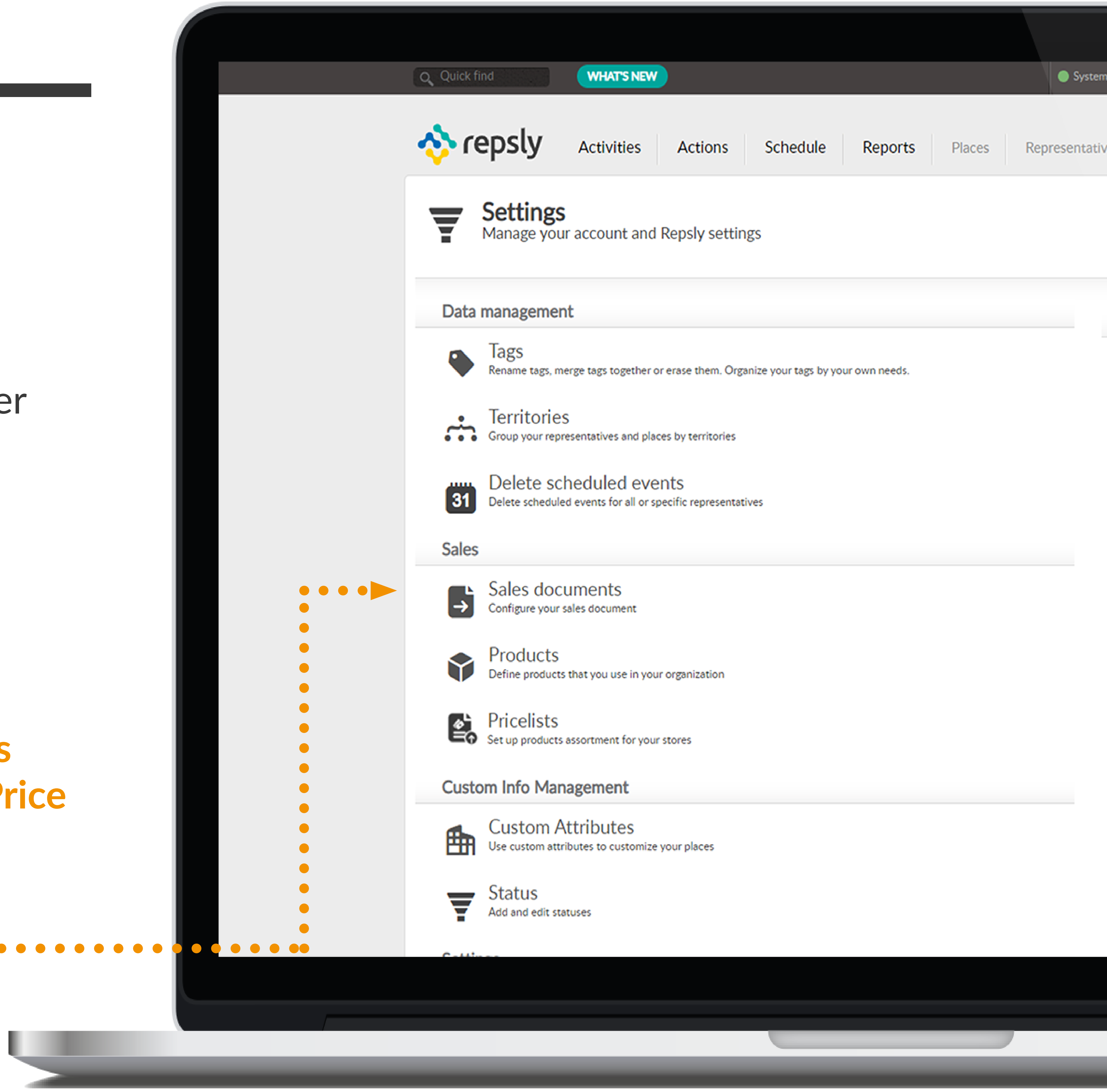


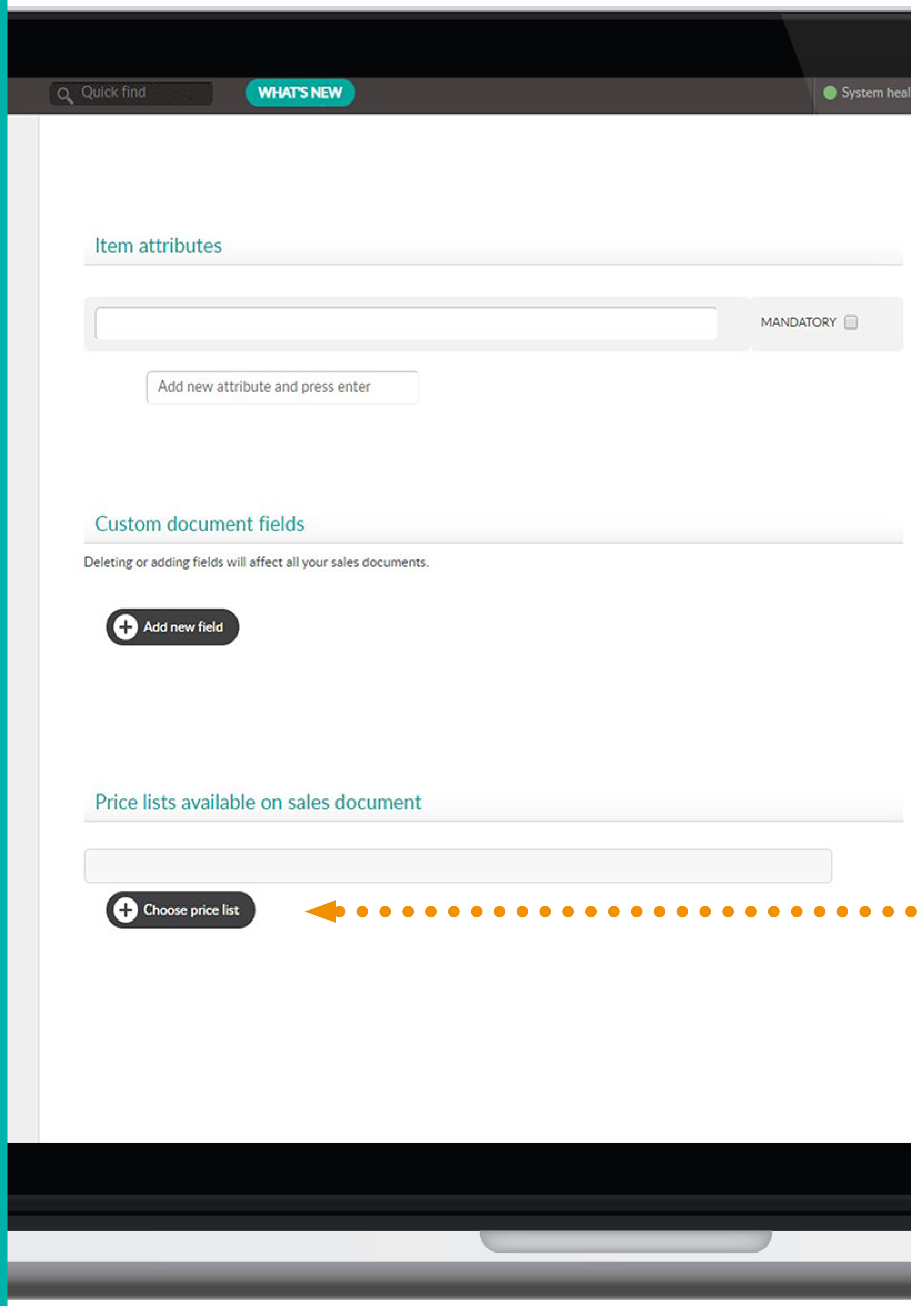
HOW TO ASSIGN PRICE LISTS TO YOUR SALES DOCUMENTS



1 Click on the **Gear Icon**, located in the upper right-hand corner of the page and select **Settings**.

2 Select **Sales documents**. Click on the **Sales Document type** you want to assign your **Price list(s)** to.

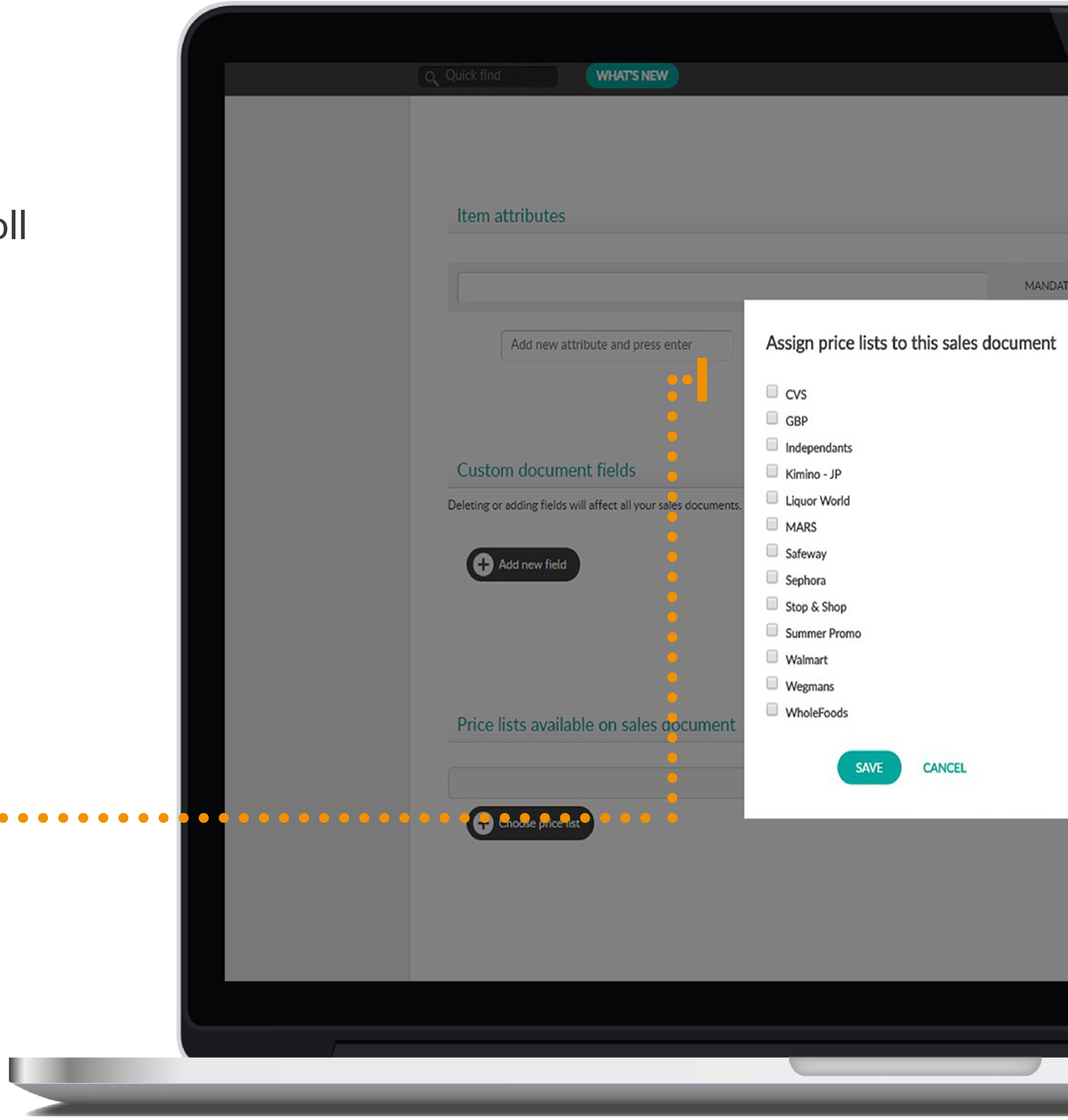




3 To do that, open the Sales Document and scroll to the bottom of the page until you see **Price lists** available on the sales documents. Then click on the **Choose Price lists** button.

4 Once you click on Choose Price lists you can select the **Price Lists** you need for that document. When you click on **Save** you will see that your document has been tagged with the chosen price-lists.

5 If all looks good, scroll back to the top of the page and click on the green **Save button** to confirm your changes.



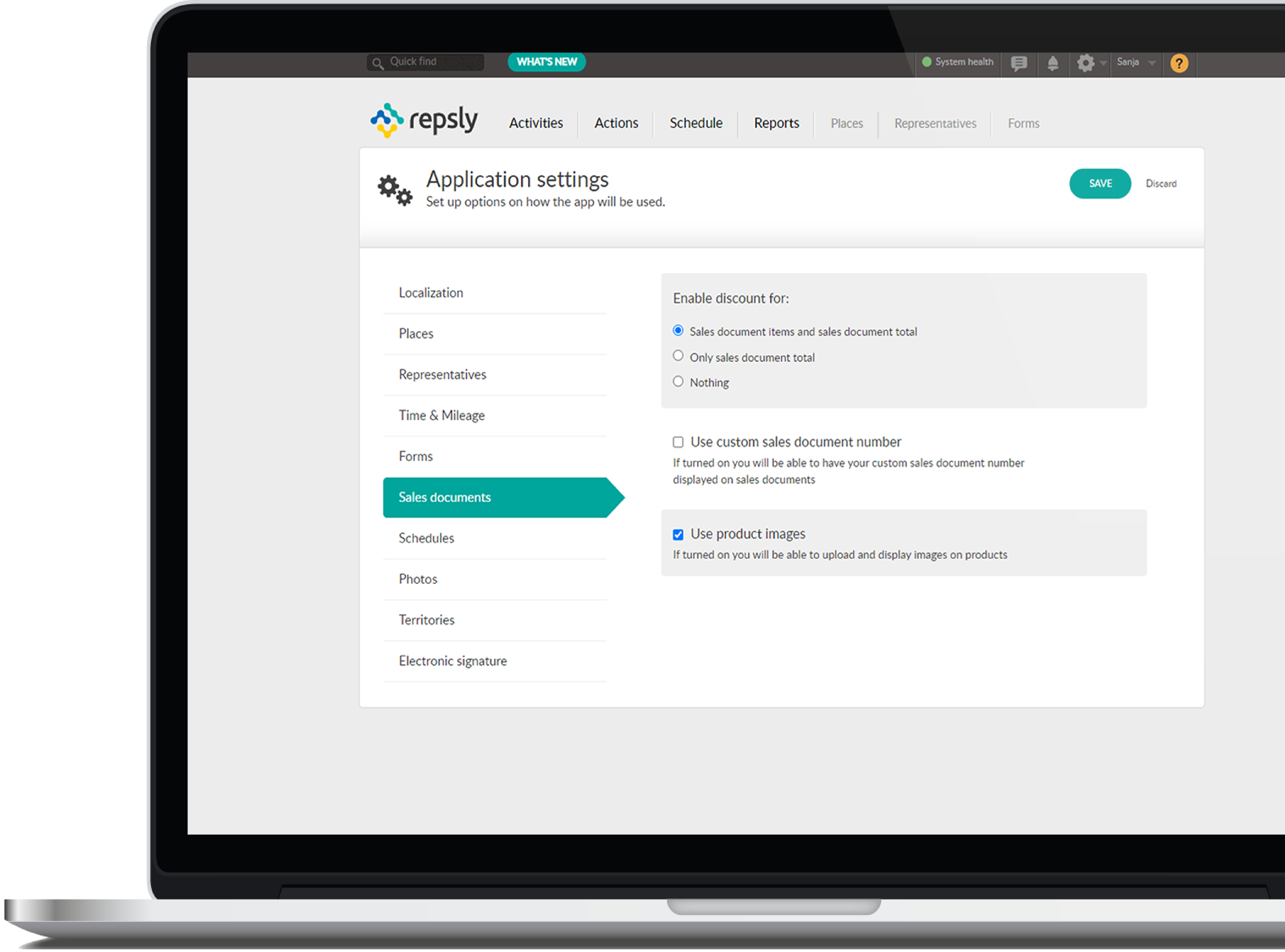
HOW TO ENABLE DISCOUNTS FOR ORDERS?

1. Click on the **Gear icon** and then click on **Settings**.

2. Now choose **Application Settings**.

3. Click on the **Sales documents tab**. Here you will see 3 options for discounts:
   1. Sales document items and sales document total,
   2. Only sales documents total
   3. Nothing.

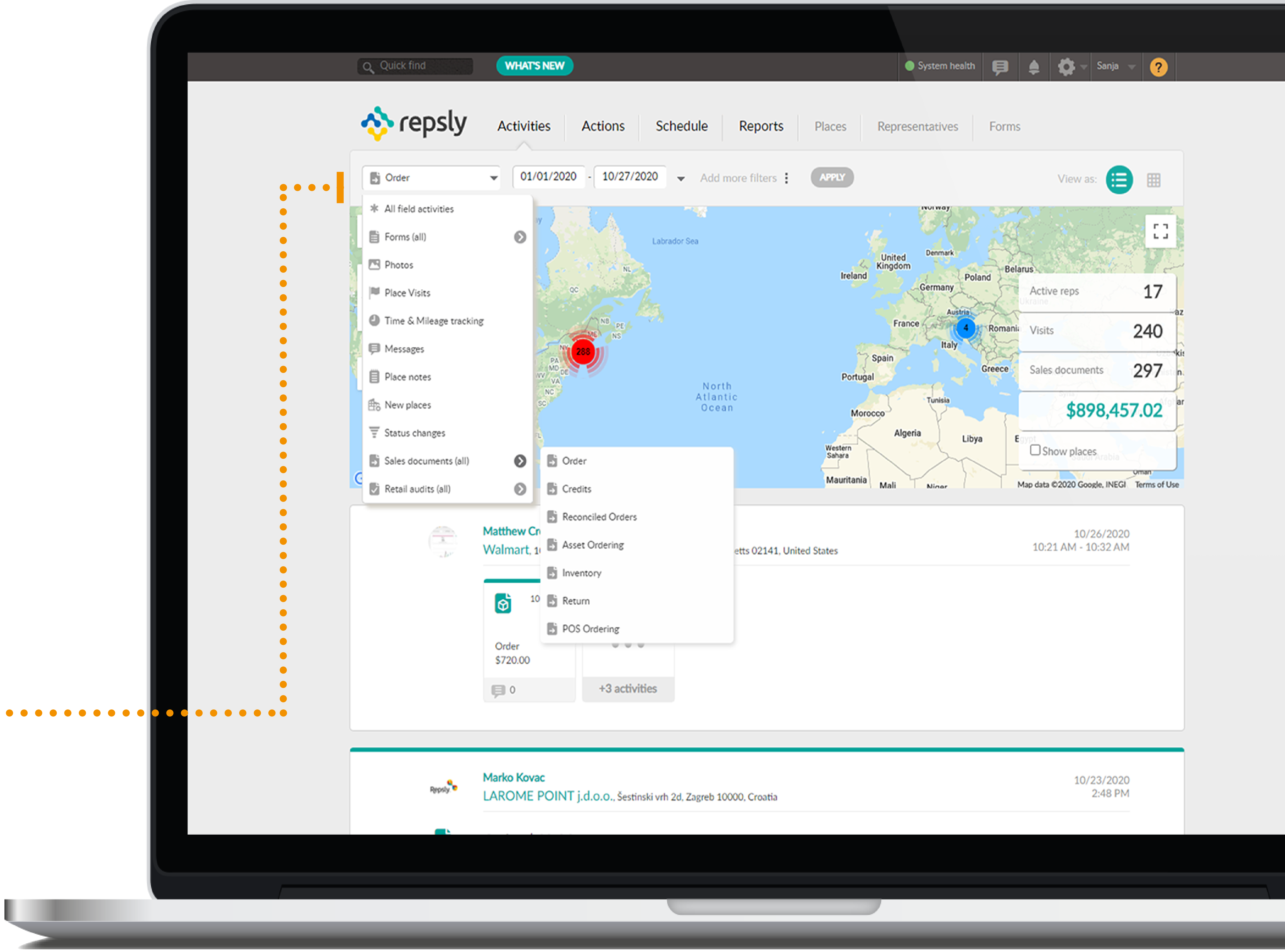
   Select the option you'd like to have and then press **Save**.

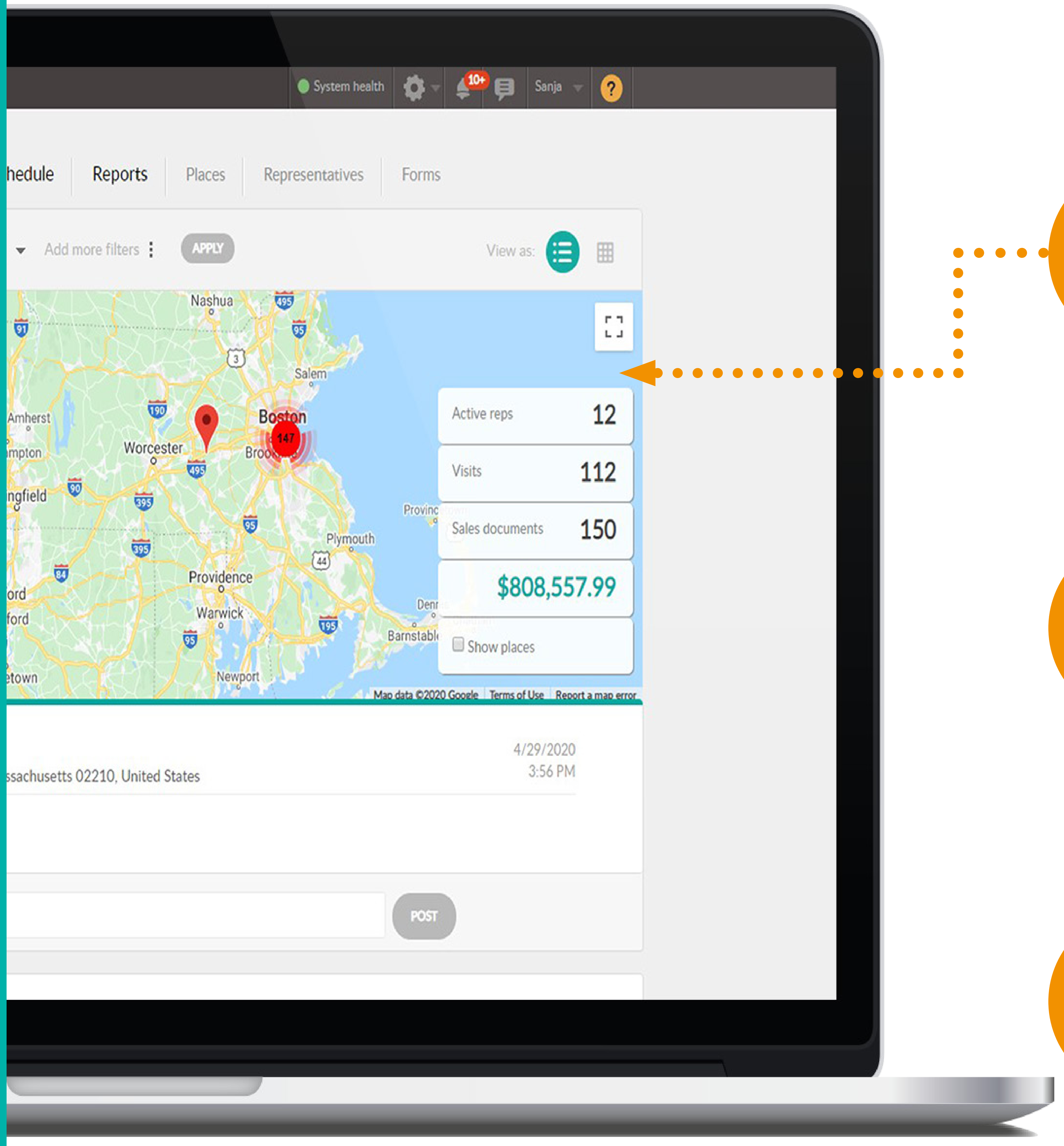


HOW TO FILTER AND EXPORT YOUR SALES DOCUMENTS?

1 Click on the **Activity Tab**.

2 Use the drop-down menu to choose your **Sales Documents**. For each Sales Document you can also adjust the Order Status or filter by Order Status. In this example, we will choose Orders.





3 Click the **Tabular view button**, located on the right-hand side of the page. This will give you a report view of your Sales data.

4 You can export the data to Excel or .csv file by clicking on the **Export button**.

5 If all looks good, scroll back to the top of the page and click on the green Save button to confirm your changes.