

or epsly

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

Click on the Gear icon and select Settings.

Click on the **Backoffice users** and

Fill in the necessary data. Save the new

	Scher
Sanja Info Report Schedule Name: Sanja Phone: Mobile access for back Info Note	sched soffice u
Restrict access to territories	Peri
Backoffice users assigned to a certain territory will not be able to see activities done by reps on places outside of these territories	Data



missions

PlacesProductsPrice lists
ProductsPrice lists
Price lists
Sales documents
Forms
Schedule
Statuses

HOW TO LIMIT BACKOFFICE USERS TO CERTAIN FUNCTIONS?

Click on the Gear Icon and select Settings.

 $\bullet \bullet \bullet \bullet \bullet \bullet \bullet \bullet \bullet$

3

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

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.

9.0	Quick find	IT'S NEW		System	health 톚 🚅 🏧 Sa
	Sanja	rities Actions chedule Name: Sanja Phone:	Schedule Reports	Places Representative	es Forms
		Mobile access for bac Enable mobile acce Note	ess	s one mobile seat.	
	Restrict access to territ	tories tain territory will not be on places outside of these	 Permissions Data Administration Places Products Price lists Sales documents Forms Schedule Statuses 		



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.



9	Quick find	HAT'S NEW		System	n health 톚 斗	🛟 👻 Sanja
<	repsly Act	ivities Actions S	chedule Reports	Places Representativ	ves Forms	
	Manage your team	tives of field representatives		••		REPRESENTA
	Q Search reps	Add more filters 🕴 📿	PPLY			View as: Pla
	NAME	TERRITORY	LATEST ACTIVITY	LAST SYNC TIME	CURRENT STATUS	ACT
	D david david.mann@repsly.	com			Not working	
	DG Davor Galambos davor.galambos@rep	usly.com	7/31/2018 1:43 PM	07/31/2018 1:40 PM	Not working	
	DS Deirdre Stenson deirdre.stenson1@re	Northeast psly.con	10/23/2020 7:36 AM at 49 Social	10/26/2020 1:51 PM	Not working	
	Dustin Jones djones@example.com	South			Not working	
	E Erin erin.ryan@repsly.com	n	3/27/2018 12:27 PM	03/27/2018 5:27 PM	Not working	c
	Frank Brogie frank.brogie@repsly.	USA, Merchandis com	8/14/2020 10:48 AM	10/22/2020 6:54 PM	Not working	
	Frankie Brogie frankie.brogie@reps	y.com	2 10/21/2019 2:03 PM	11/27/2019 10:05 AM	Not working	~
	TC: DWOW					



Enter the Rep's contact information. 2 Activation data will allow them to access 3 the mobile application. Click Save to send the Rep an email 4

prompting them to download the app to their mobile device and providing them with all of their Activation Data so they can log in.



	cepsly Acti	ivities Actions Sche	edule Reports	Places Represen	tatives Forms
	Dustin Jone	S Schedule			
		Name:	ID:		SAVE
		Dustin Jones	293641	dotive rep	
• • • • • • • • • • • • • • • • • • •	00	Phone:	Email:		
		6178991951	djones@example.com	1	•
		Allow representative to send e	emails from mobile app		•
		Territory:			•
		South x		•	
		Note			
					•
					•
• • • • • • • • • • • • • • • • • • •		Activation data			
		Company ID: repsly.296			•
		Username: djones			•
		Password: CHANGE PASS	SWORD		• • ••



Cancel

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.

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

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.



🔷 repsly		
Email sanja.novotny@repsly.com		
Password)	
LOG IN)	
Forgot your password?		
Don't have an account? Register here!		
<u>Terms</u> <u>Privacy</u>		



HOW TO ENTER A NEW PLACE?



Select Places tab and click the New Place button.



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.*



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.

角 N	ew place				
Contact i Name:	nfo Report Schedule	ID:			CAVE
Starbu	cks	40		active place	SAVE
Represer	tatives:	Status:	Territory:		
There	are no reps assigned to this play	Top 30 Place	• •	•	Place Attributes
Place p	rice lists		Q		
Flace p	Tice lists		► USA		Place ID is a unique identifier we ass place.
			International	l.	Un-check 'active place' if you don't w
Addres	sinfo	Contact in	Midwest		this place in lists.
Addres	5 1110	Contact II	(Duke)		STATUS is a way to track your places
Address:		Email:	(Merchandis	ing)	TERRITORIES let you group places. N
City:		Phone:	··· Furope		Territories on the Settings page.
State:		Cell phone:	02176		
ZIP:		Website:	09567		•
Country:		Contact name:			
Country code	e:	Contact title:			
Note		Tags		+ Add tags	
					Tags



8 Repsly Backoffice Manager Training Guide **HOW TO IMPORT PLACE** 🔎 🖄 Sanja 🚽 🥐 🔵 System health 🛛 👩 🧟 **LISTS INTO REPSLY?** Places Representatives Forms Reports You can import place lists, by either importing an excel file + NEW PLACE trends. or by the copy and paste method into the back office. This Import Places allows you to edit larger quantities of data in bulk. Add tags to filtered places To get a template for upload you can go to the Places tab and export the Excel file from that page. STATUS LATEST ACTIVITY AT PLACE ACTIVE Final Stage Clo... Ken Bruskiewitz 1/4/2019 8:56 AM ~ Select Places tab. Next to the New Place is a HOT lead Alex Brussard 1/16/2019 1:18 PM ~ drop-down menu. In this menu, you will see Len Bruskiewitz 1/8/2019 7:32 AM an option to import places. ~ HOT lead Len Bruskiewitz 1/7/2019 11:25 AM ~ HOT lead Alex Brussard 1/9/2019 10:12 AM 1 Left Samples N... Lev Rrussard 1/15/2019 3:28 PM From the import page, choose whether to 2 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.

	Q Quick find	WHAT'S NEW	
	🚸 repsly	Activities Actions	Schedu
	Places in Import all pla	mport ces using the import wizard	
	From your compu	iter	
	Upload fil Upload file in CS	e SV, XLS or XLSX format directly from y	our computer
•••	Choose File No fil First row contains column	le chosen n names? 🗹	AD FILE
	Copy and Copy and paster	Paste from Excel, any other spreadsheet, or	even a web pa
_			_

dule	Reports	P
er		
page.		
_		



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.

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

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

When you make your selection, click on the three vertical green dots as pictured







When you click on Assign a territory another window will appear with a dropdown menu with all your Territories to choose from. When you choose the desired territory

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.









eports		Places		Rep
	_			TOPY
		Iv	AND	AIORI

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.

Click on the Gear Icon and select Settings.

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

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.





.

2

9.0	Quick find WHAT'S NEW				ystem health 👂 🧯	💶 🎝 🗸 Sanja
~	Activities	Actions	Schedule Reports	Places Represer	tatives Forms	
	Sanja Info Report Schedule					
	Name: Sanja Phone:		ID: 46080 Email: Sanja.Novotny@repsly.co	active user		SAVE -
	Mobi	ile access for back nable mobile acces	office users will be charged as o	one mobile seat.		
	Restrict access to territories		Permissions			
	Backoffice users assigned to a certain territor able to see activities done by reps on places of territories	ry will not be outside of these	Data Administration Places Products Price lists			
• •	-	•	 Sales documents Forms Schedule Statuses 			
		_			_	_



Cancel



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.

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.

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







Q Quick find	WHAT'S NEW				System health	Ş	🛓 🧔 🔻 Sanja 👻
Forms Use forms	to keep record o	f your reps activities.					
Title: Out of Stock				✓ active form			SAVE -
				Auto-fill on open			
Description:							
Use this to rep	ort any Out of Stock	Items					
Set form acce	essibility						
Connected to pla	ces with any of the	ese tags:					
Safeway ×	Walmart ×	Start typing a place tag	ſ				
Visible to these re	eps:						
All reps Start t	yping rep's name						
Questions &	input fields						
This form has be If you change the affected.	en submitted 6 time e structure of the qu	e(s). Jestions all previously su	Ibmitted forms won	't be editable and Reporting	will be		
0 📰 🕅	at Product is OOS?			AUTO-FILL MANDA	TORY 🗹 🗙		
0	Extreme Strawb	bana		Go to grou	•1 ▼ ×		
0	Grape Splosion			Conditional act	ion 👻 X		



HOW TO EDITA 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.









Click on the Tabular View Icon.

Click on the magnifying glass next to the form

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.

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



Q Quick find WHAT'S NEW Image: Construction of the second secon	Schedule Reports Places	System health System health Forms
Forms Use forms to keep record of your reps activity	ties.	6
Q Search forms		
Account Visit Form		
Q COVID-19 Update Please fill this out when visiting an account for the first time	since COVID-19. If this form submission has already be	en submitted on the account then there is
O End of Year Saving Promo (National Banners)		
Q Hudson News - Survey 23 (Time Magazine)		
Q Hudsone News Survey 113 (Hint Water - Safeway)		
Q MARS KPI tracker		
Merchandising and Competitor Insight Report Here's a sample form you might use for teams that do merch Merchandising Visit Report	andising, retail execution, or competitor analysis. Feel fi	ree to customize this form to capture the d
Required for each company account visit centered on merch On-Premise Sales Recap	indising.	
•		
00		Showing
	Quick find WHAT'S NEW Image: Control of C	Control WRATESNEW Control Activities Activities Activities Activities Activities Activities Control Image: Control Image: Control Control Image: Control Control Image: Control Control Image: Control Control Image: Control Control Control Image: Control Control Control Image: Control Control Control Image: Control Control Control Image: Control Control Control Image: Control Control Control Image: Control Control Cont

📸 🗸 Sanja 🚽 🧿	
no need to fill out again.	
etails that are most important	
g 1-10 out of 24 records	

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.



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.



Q Quick find	WHAT'S NEW			• System health 😝 🌲 🛱
🚸 repsly	Activities Actions	Schedule Repo	orts Places Repr	resentatives Forms
Forms Use forms to	keep record of your reps ad	ctivities.		
Title: COVID-19 Update			active form	Sł
Description:			Auto-fill on open	
Please fill this out v been submitted on	when visiting an account for the f the account then there is no nee	first time since COVID-19. If the dot of the fill out again.	his form submission has already	'
Set form accessi	bility			
Connected to places	with any of these tags:			
All places Start typ	ing a place tag			
Visible to these reps:				
All reps Start typin	ig rep's name			
Questions & inp	ut fields			
This form has been so If you change the strue affected.	ubmitted 13 time(s). ucture of the questions all prev	viously submitted forms won	't be editable and Reporting	will be
Are hour	rs of operation still the same prio	r to COVID?	AUTO-FILL MANDAT	



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.

Click on the Activities tab to filter activities.

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

The date filter allows you to filter by date range.

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

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



Click on a **Reports tab**.

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

edule Reports Pla
APPLY
Place visits
12
Avg. visits/day: 1.8
Oct 12 Oct 14 Of at place — Place visits — To
ime Total r
ine lotali



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.



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.





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

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.

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



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.

2

3

- selected places.
- updated.



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.

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

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



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.

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



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.



7-Eleven 632 East Broadway Boston, 02127, Massachusetts, United States Contact Info Representatives: 7-Eleven 17593455 Castor Representatives: Status: Verthandelwal Anshika Khandelwal Anshika Khandelwal Anshika Khandelwal Courtery Rayapui Status: Contact info Name: Dimensionel Harris James McGuire Maxies Contror Flynn		Activities	Actions Schedule	Reports Places Representatives	S
Name: D: 7-Eleven 17593455 Representatives: Status: Anshika Khandelwal and 5 others ar High Volume Anshika Khandelwal Anshika Khandelwal P Bo Thurmond Anshika Khandelwal Anshika Khandelwal P Bo Thurmond Concor Flynn Anshika Khandelwal P Danielle Harris O Janielle Harris James McGuire Nota assigned Email: dave@gmail.com Ponne: +16172682946 Email: dave@gmail.com Cry Cameron Garrant Phone: Email: dave@gmail.com Viet 02127 Website: https://www.7-eleven.com/locations/n Country: United States Contact title: Grocery manager Note Tags Addiager		Contact info	2127, Massachusetts, Unite	d States	
7-Eleven 17593455 I active place Representatives: Aanshika Khandelwal and 5 others ar I ligh Volume Merchandising Team Aanshika Khandelwal I go Thurmond Assigned Image: Second Flynn Image: Second Flynn Assigned Image: Courtery Rayappu Image: Second Flynn Contact info Image: Danielle Harris Image: Second Flynn Image: Second Flynn Image: Danielle Harris Image: Second Flynn Image: Second Flynn Image: Danielle Harris Image: Second Flynn Image: Second Flynn Image: Danielle Harris Image: Second Flynn Image: Second Flynn Image: Danielle Harris Image: Second Flynn Image: Second Flynn Image: Danielle Harris Image: Second Flynn Image: Second Flynn Image: Danielle Harris Image: Second Flynn Image: Second Flynn Image: Connor Flynn Image: Second Flynn Image: Second Flynn Image: Connor Flynn Image: Imag		Name:	ID:		
Representatives: Status: Territory: Aanshika Khandelwal and 5 others an Itigh Volume Merchandisling Team Assigned Aanshika Khandelwal Ø Aonshika Khandelwal Ø Bo Thurmond Ø Bo Thurmond Ø Courtery Rayapu Ø Danielle Harris Ø James McGuire Not assigned Ensali: Idage@gmail.com Phone: Idage@gmail.com Finali: Idage@gmail.com Phone: Idage@gmail.com Phone: Idage@gmail.com Contror Flynn Idage@gmail.com Phone: Idage@gmail.com Idage@gmail.com Idage@gmail.com Phone: Idage@gmail.com Phone: Idage@gmail.com Idage@gmail.com Idage@gmail.com Phone: Idage@gmail.com Idage@gmail.com Idage@gmail.com Idage@gmail.com Idage@gmail.com Idage@gmail.com Idage@gmail.com Idage@gmail.com Idage@gmail.com Idage@gmail.com Idage@gmail.com		7-Eleven	17593455	active place	
Assigned x ^C Aanshika Khandelwal Assign price lists to this place ^C Contrey Rayappu Coutney Rayappu ^C Danielle Harris Map view Contact info ^{Not} assigned Map view Contact info ^{Not} assigned Ben Mancall Email: dave@gmail.com ^{Contor Flynn Connor Flynn Email: dave@gmail.com ^{City} ^{Cameron} Garrant Phone: +16172682946 ^{Contor Flynn ^{Cell} phone: ^{City} ^{Contor Flynn ^{Cell} phone: ^{City} ^{Contor Flynn ^{Cell} phone: ^{City} ^{Contor Flynn ^{Contor} Flynn ^{Contor} Flynn ^{City} ^{Other States ^{Contact} mane: ^{Im ^{Contact} title: ^{Grocery manager ^{Note ^{Tags ^{Add test}}}}}}}}}}}	• • • • • • • • • • • • • • • • • • •	Representatives: Aanshika Khandelwal and 5 others are	Status: High Volume	 Territory: Merchandising Team 	(
Aanshika Khandelwal P Bo Thurmond Conor Flynn Conor Flynn Courtney Rayappu Danielle Harris James McGuire Not assigned Ben Mancall Ben Mancall Ben Mancall Brendan Bruno City Cameron Garrant Phone: +16172682946 Connor Flynn Stat Connor Flynn Cell phone:	_	Assigned		×	
Conor Flynn Courtney Rayappu Danielle Harris James McGuire Mao view Contact info Ade Ben Mancall Brendan Bruno Email: Citric Cameron Garrant Phone: Connor Flynn Cell phone: Stat Connor Flynn ZIP: 02127 Vebsite: https://www.7-eleven.com/locations/r Country: United States Country code: Contact title: Store Contact title: Grocery manager	_	Aanshika Khandelwal Bo Thurmond		Assign price lists to this place	Pla
Courtney Rayappu Danielle Harris James McGuire Not assigned Ben Mancall Berndan Bruno City Cameron Garrant Phone: +16172682946 Connor Flynn Stat Connor Flynn ZIP: 02127 Country: United States Contact name: Jim Country code: Note		Conor Flynn			Ur
Adc Ben Mancall Brendan Bruno City Cameron Garrant Connor Flynn Stat Connor Flynn. ZIP: 02127 Country: United States Contact name: Jim Country code: Note Tags		 Courtney Rayappu Danielle Harris James McGuire Not assigned 	Map view Contact i	nfo	th ST
City Cameron Garrant City Cameron Garrant Phone: +16172682946 Connor Flynn Cell phone: Stat Connor Flynn. ZIP: 02127 O2127 Country: United States Country: United States Country code: Contact name: Jim Note Tags		Adc Ben Mancall	Email:	dave@gmail.com	Те
Connor Flynn Stat Connor Flynn. ZIP: 02127 Country: United States Contact name: Jim Country code: Note Tags Add tags		City Cameron Garrant	Phone:	+16172682946	
ZIP: 02127 Country: United States Country code: Contact name: Jim Country code: Note Note Tags		Stat Connor Flynn	Cell phone:		
Country: United States Country code: Contact name: Jim Country code: Note		ZIP: 02127	Website:	https://www.7-eleven.com/locations/n	
Country code: Contact title: Grocery manager Note Tags Add tags		Country: United States	Contact name:	Jim	
Note Tags		Country code:	Contact title:	Grocery manager	
		Note	Tags	+ Add tags	
CVS × 7/11 × Monday × Safeway ×			CVS × 7/2	1 × Monday × Safeway ×	(





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

2

Create a new chat and select teammate(s).



		Chat with Northeast Team	
10/2018		10/2018	
Tax Office			Message
			н
			Hope you're having a great day. Just a heads up; don't forget a
			Also, great job with these shelf's, De
ESSAGE	Type your message		



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.



	O Oulck find	WHAT'S NEW	System bealth
	🚸 repsly	Activities Actions Schedule Reports Places	Representatives Forms
•••••••••••	Schud Manage lis	NEW VISIT	
	Q Search reps	Place Start typing Place name	
		Representatives Start typing Representative name Date	27, 2020
	Representatives Aanshika Khandeh Ben Mancall	10/27/2020 Set as due date Time Duration	4pm 5p
	Bo Thurmond Brendan Bruno Cameron Garrant	Description	
	Connor Flynn Connor Flynn. Conor Flynn		
	Courtney Rayappu	Tasks	
		Alerts	ADD TO SCHEDULE CANCEL
		< CVS Pharmacy (Any time) < CVS Pharmacy (Any time)	
		CVS Pharmacy (Any time)	



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.



	WHAT'S NEW			Syst	tem health 👂 🌲	🔅 🔻 Sanja
Matthew Info Report	Activities • Act	ions Schedule	Reports	laces Representa	itives Forms	
			MONTH WEE	K DAY TODAY		ctober 2020
27 27 4	MON 28 Safeway Walmart Walmart Walmart 2:23p Walmart 2:28p Walmart 2:31p Walmart 2:49p Walmart 5	TUE 29 Walmart Walmart 3:24p Walmart 3:24p Walmart 6 Whole Foods Market 2:29a Safeway (POS Exam	WED 30 Walmart Walmart 7 Safeway	THU 1 Liquor World Walmart	FRI 2 Safeway	SAT
11	12 Safeway Walmart	2:31p Safeway (POS Exam 2:45p Walmart 2:53p Walmart 13 Walmart Walmart	14 Sephora	1:53p Safeway 15	16 Safeway 12:33p Common Market Inc	



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

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

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.

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.

Click on the Activities Tab.

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

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









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.

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

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

C

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.

Q, Qui	ck find	WHAT'S NEW) System health 🗭 🌲 🏟 🗸 Sanja 🚽
	repsly	Activities Acti	ons Schedule Reports Places Repres	sentatives Forms
	ace notes 🗸 🔻	01/01/2020 -	10/27/2020 Add more filters : APPLY	View as:
Place	e notes	• • • • • • • •		
	REPRESENTATIVE	DATE AND TIME	PLACE	NOTE
Q	Matthew Creamer	9/28/2020 2:32 PM	Walmart 225 Franklin Street, Boston, Massachusetts 02110, United States	"This account is a total crazy factory "
Q	Deirdre Stenson	9/21/2020 12:41 PM	CVS 631 Washington Street, Boston, Massachusetts 02111, United States	"Halloween Promos/Pricing only on second level
Q	Danielle Harris	9/16/2020 12:56 PM	7-Eleven 673 East Broadway, Boston, Massachusetts 02127, United States	"Store manager difficult but got our space back."
Q	Joseph Hussey	9/11/2020 2:18 PM	Safeway Court Square, Boston, Massachusetts 02108, United States	"Manager is out sick. "
ବ	Danielle Harris	9/10/2020 3:17 PM	ACME Markets 800 West Avenue, Ocean City, New Jersey 08226, United States	"Note! "
Q	Joseph Hussey	9/10/2020 2:30 PM	Walmart 226 Washington Street, Boston, Massachusetts 02109, United States	"Manager out sick today. "
Q	Matthew Creamer	8/20/2020 10:37 AM	Walmart 192 South Street, Boston, Massachusetts 02111, United States	"John loves brooks running need to convert him!!!!"
Q	Danielle Harris	8/14/2020 10:14 AM	ACME Markets 800 West Avenue, Ocean City, New Jersey 08226, United States	"Convo with manager! "
Q	Matthew Brogie	8/13/2020 1:20 PM	CVS Pharmacy 55 Summer Street, Boston, Massachusetts 02110, United States	"Educated Bob"
Q	Danielle Harris	8/11/2020 3:36 PM	ACME Markets 800 West Avenue, Ocean City, New Jersey 08226, United States	"Test conversations "
0		ORT		Showing 11-20 out of 86 reco



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.

Click on the Gear Icon and then click on Settings.



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.



Q Quick find WHAT'S NEW	System health 🗐 🌲 🔅
cepsly Activities Action Activities Action	s Schedule Reports Places Representatives Forms
Set up options on how the app will be	e used.
Places Representatives	 Enable discount for: Sales document items and sales document total Only sales document total Nothing
Time & Mileage Forms	 Use custom sales document number If turned on you will be able to have your custom sales document number displayed on sales documents
Schedules Photos	Use product images If turned on you will be able to upload and display images on products
Territories Electronic signature	



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.

HOW TO VIEW REPORT?

Places Manage list of your places and easily analyze activities and trusts. Q Search places 11/01/2020 I1/16/2020 Add more filters APPLY View as: Rankings V PLACE VISITS FORMS PHOTOS NOTES SALES DOCUMENTS V RACME Markets 1 0 0 0 1 V REVEN 2 2 2 1 1 V REVEN 1 0 0 0 0 1 V REVEN 1 0 0 0 0 0 1<	Places Notes Notes <t< th=""><th>Places Add more filters APRS* • Search places 11/01/2020 11/16/2020 Add more filters APRS* Viewas: Rankings • PLACE 11/01/2020 11/16/2020 Add more filters APRS* Viewas: Rankings • Q 6 Structure Convenience 1 0 0 0</th><th></th><th>ivities Actions</th><th>Schedule</th><th>Reports Plac</th><th>ces Representativ</th><th>res Forms</th><th></th></t<>	Places Add more filters APRS* • Search places 11/01/2020 11/16/2020 Add more filters APRS* Viewas: Rankings • PLACE 11/01/2020 11/16/2020 Add more filters APRS* Viewas: Rankings • Q 6 Structure Convenience 1 0 0 0		ivities Actions	Schedule	Reports Plac	ces Representativ	res Forms	
Q Search places11/01/2020 $11/16/2020$ $A dd more filters$ CAPEXView as: RankingsView as: RankingsPLACEVISITSFORMSPHOTOSNOTESSALES DOCUMENTS $<$ Q 6 Twelve Convenience10001 $<$ Q 7-Eleven22211 $<$ Q ACME Markets110000 $<$ Q CVS102000	Q Search places 11/01/2020 11/16/2020 Add more filters APPLY Verve & Rankings V PLACE VISITS FORMS PHOTOS NOTES SALES DOCUMENTS RET V Q & forwerience 1 0 0 0 1 1 V Q & forwerience 1 1 0 1	Q Search places 11/01/202 11/16/202 Add more filters APPY Procession SALES DOCUMENTS RET V PLACE VISITS FORMS PHOTOS NOTES SALES DOCUMENTS RET V Q & Struelve Convenience 1 0 0 0 1 1 V Q & Struelve Convenience 1 0 0 0 1 <th>Places Manage list of you</th> <th>r places and easily analyze</th> <th>e activities and</th> <th>trends.</th> <th></th> <th>+ NEW PLACE</th> <th></th>	Places Manage list of you	r places and easily analyze	e activities and	trends.		+ NEW PLACE	
PLACEVISITSFORMSPHOTOSNOTESSALES DOCUMENTS• Q 6 Twelve Convenience10001• Q 7-Eleven2221• Q ACME Markets11011• Q BYOD dog wash10000• Q CVS10200• Q CVS11100	PLACE VISITS FORMS PHOTOS NOTES SALES DOCUMENTS RET 	PLACE VISITS FORMS PHOTOS NOTES SALES DOCUMENTS RET	Q Search places	11/01/2020 11/16/	2020 v Ado	I more filters 🕴 🌘	APPLY	View as: R	ankings 👻
· Q 6 Twelve Convenience 1 0 0 0 1 · Q 7-Eleven 2 2 2 2 1 · Q ACME Markets 1 1 0 1 1 · Q BYOD dog wash 1 0 0 0 0 · Q CVS 1 0 2 0 0	· Q 6 Twelve Convenience 1 0 0 0 1 · Q 7-Eleven 2 2 2 2 1 · Q ACME Markets 1 1 0 1 1 · Q BYOD dog wash 1 0 0 0 0 · Q CVS 1 0 2 0 0 · Q CVS 1 1 1 0 0 · Q CVS East Boston 1 0 0 0 0 · Q LVS Harmecy 1 1 2 0 0 0 · Q LVS House 1 1 2 0 0 0 0	• Q 6 Twelve Convenience 1 0 0 0 1 • Q 7-Eleven 2 2 2 2 1 • Q ACME Markets 1 1 0 1 1 • Q BYOD dog wash 1 0 0 0 0 • Q CVS 1 0 2 0 0 • Q CVS 1 1 1 0 0 • Q CVS East Boston 1 0 0 0 0 • Q CVS Pharmacy 1 1 2 0 0 0 • Q Java House 1 1 2 0 0 0 0	V PLACE	VISITS	FORMS	PHOTOS	NOTES	SALES DOCUMENTS	RET
 Q. 7-Eleven Q. ACME Markets I <lii< li=""> <lii< li=""> I</lii<></lii<>	· Q. 7-Eleven 2 2 2 2 1 · Q. ACME Markets 1 1 0 1 1 · Q. ACME Markets 1 0 0 0 0 · Q. BYOD dog wash 1 0 0 0 0 · Q. CVS 1 0 2 0 0 · Q. CVS 1 1 1 0 0 · Q. CVS East Boston 1 0 0 0 0 · Q. CVS Pharmacy 1 1 2 0 0 0 · Q. Java House 1 1 2 0 0 • •	· Q. 7-Eleven 2 2 2 2 1 · Q. ACME Markets 1 1 0 1 1 · Q. ACME Markets 1 0 0 0 0 · Q. BYOD dog wash 1 0 0 0 0 · Q. CVS 1 0 2 0 0 · Q. CVS 1 1 1 0 0 · Q. CVS East Boston 1 0 0 0 0 · Q. CVS Pharmacy 1 1 2 0 0 0 · Q. Java House 1 1 2 0 0 0 0		1	0	0	0	1	í
C ACME Markets 1 1 0 1 1 C BYOD dog wash 1 0 0 0 0 C CVS 1 0 2 0 0 C CVS 1 1 1 0 0	 Q. ACME Markets 1 1 0 0<td> </td><td>V Q 7-Eleven</td><td>2</td><td>2</td><td>2</td><td>2</td><td>1</td><td></td>	 	V Q 7-Eleven	2	2	2	2	1	
C BYOD dog wash 1 0 0 0 0 0 C CVS 1 0 2 0	Q BYOD dog wash 1 0 0 0 0 0 Q CVS 1 0 2 0	Q BYOD dog wash 1 0 <	ACME Markets	1	1	0	1	1	
Q cvs 1 0 2 0 0 Q cvs 1 1 1 0 0	V Q CVS 1 0 2 0 0 V Q CVS 1 1 1 0 0 V Q CVS East Boston 1 0 0 0 0 V Q CVS Pharmacy 1 1 2 0 0 V Q Java House 1 1 2 0 0	V Q CVS 1 0 2 0 0 V Q CVS 1 1 1 0 0 V Q CVS East Boston 1 0 0 0 0 V Q CVS Fharmacy 1 1 2 0 0 V Q Java House 1 1 2 0 0	Q BYOD dog wash	1	0	0	0	0	
✓ Q CVS 1 1 1 0 0	CVS 1 1 1 0 0 CVS East Boston 1 0 0 0 0 CVS East Boston 1 1 2 0 0 CVS Pharmacy 1 1 2 0 0 Q Java House 1 1 2 0 0	CVS 1 1 1 0 0 CVS East Boston 1 0 0 0 0 CVS East Boston 1 1 2 0 0 CVS Pharmacy 1 1 2 0 0 Q Java House 1 1 2 0 0	v Q cvs	1	0	2	0	0	
	Q CVS East Boston 1 0 0 0 0 0 Q CVS Pharmacy 1 1 2 0 </td <td>Q CVS East Boston 1 0 0 0 0 0 Q CVS Pharmacy 1 1 2 0<!--</td--><td>Q CVS</td><td>1</td><td>1</td><td>1</td><td>0</td><td>0</td><td></td></td>	Q CVS East Boston 1 0 0 0 0 0 Q CVS Pharmacy 1 1 2 0 </td <td>Q CVS</td> <td>1</td> <td>1</td> <td>1</td> <td>0</td> <td>0</td> <td></td>	Q CVS	1	1	1	0	0	
CVS East Boston 1 0 0 0 0	Q CVS Pharmacy 1 1 2 0 0 Q Java House 1 1 2 0 0 0	CVS Pharmacy 1 1 2 0 0 Q Java House 1 1 2 0 0	CVS East Boston	1	0	0	0	0	
CVS Pharmacy 1 1 2 0 0	✓ Q Java House 1 1 2 0 0	✓ Q Java House 1 1 2 0 0 ∢	CVS Pharmacy	1	1	2	0	0	_
Q Java House 1 1 2 0 0			Java House	1	1	2	0	0	

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





01/01/	2020 - 10/27/2020	Add more filters : APPLY				
Order						
	Sales by Product Analyze your sales resu	ts by Products		SN	APSHOT TREND BY	
	PRODUCT ID	NAME	PRICE	SALES QUANTITY	SALES TOTAL 👻	
Q	22	Asahi, Super Dry	\$ 3000	241	\$ 719400	^
Q	25	Canon EOS 5D Mark IV Camera	\$ 3099	37	\$ 113888.25	
Q	23	Greenworks, 80V 18-Inch Cordless Brush	\$ 299	26	\$ 7774	
Q	21	Ipswich Ale Brewery, Summer Ale	\$ 16.99	414	\$ 7033.86	
Q	2	Opulent Gin	\$ 29.99	180	\$ 5398.2	
Q	27	Royal Canin Large Adult Dog Food	\$ 53.99	71	\$ 3833.29	
ଷ୍	15	Beautyblender, Original Blender Sponge	\$ 25	159	\$ 3829.69	
ସ୍	11	KIND Bars, Peanut Butter Dark Chocolate	\$ 5.99	696	\$ 3729.29	
Q	14	Beyond Meat, Beyond Burger	\$ 5.99	673	\$ 3711.12	
Q	26	Altra Duo Men's Sneakes	\$ 65	50	\$ 3185	•

Sales Report: this is a sales report by each product

🚸 repsly	Activities Ad	tions Schedule	Reports P	Places Representa	atives Forms	*				
01/01/2020 - 10/2	7/2020 👻 Add more	e filters : APPLY			EMAIL REPO					
Analyze how	Analyze how well your team is covering the territory									
	Total places (?)	Places visited (?)	Coverage (%) (?)	Time traveling (?)	Time at place (?)	Link to coverage ⑦				
Brendan Bruno	-	0			-					
Cameron Garrant	1	0	0 %	3m	-	Places visited Places not visited				
Connor Flynn		0								
Connor Flynn.		0		22m	-					
Conor Flynn	7	5	71 %	5d 7h 38m	7h 29m	<u>Places visited</u> <u>Places not visited</u>				
Courtney Rayappu	3	1	33 %	36d 6h 3m	1h 54m	<u>Places visited</u> <u>Places not visited</u>				
Dan	8	3	37 %	3d 28m	1d 18m	Places visited Places not visited				
Danielle Harris	96	27	28 %	8d 6h 59m	1d 7h 38m	Places visited Places not visited				
david		0								
Davor Galambos		0								
						N				

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



💠 repsl	Activitie	es Actions	Schedule	Reports	Places Represe	entatives	Forms		
Time & Mileage t	a 💌 01/0	01/2020 - 10/27/2	2020 👻 Add	more filters	APPLY			View as:	
Working Time									
REPRESENT	ATIVE DATE	WORKDAY START	WORKDAY END	MILEAGE START (M) MILEAGE END (MI)	FIRST VISIT	LAST VISIT	MILEAGE TOTAL (MI)	ТІМІ
Matthew Cre	amer 10/26/202	0 10:09 AM	10:11 PM	0	0.38	10:21 AM	10:32 AM	0.38	11:5
Patrick Maho	ney 10/23/202	0 11:09 AM	11:14 PM	0	0	11:17 AM	3:20 PM	0	12:0
Q Patrick Maho	ney 10/22/202	0 10:44 AM	10:52 PM	0	0	10:49 AM	12:25 PM	0	0:13
Q Dan	10/21/202	0 02:36 PM	05:45 PM	0	22	2:22 PM	2:22 PM	22	3:08
Q Danielle Harr	is 10/21/202	0 11:49 AM	11:49 PM	0	0	11:50 AM	11:50 AM	0	12:0
Q Patrick Maho	ney 10/21/202	0 10:13 AM	10:13 PM	0	0	10:18 AM	10:20 AM	0	0:06
Matthew Cre	amer 10/20/202	0 3:38 PM		0	0	3:51 PM	3:51 PM	0	0:00
Q Patrick Maho	ney 10/20/202	0 11:10 AM		0	0	11:13 AM	11:49 AM	0	0:00
Q Danielle Harr	is 10/19/202	0 11:23 AM	11:24 PM	0	0	11:24 AM	11:38 AM	0	11:4
Q Deirdre Sten	on 10/19/202	0 8:58 AM		0	0	8:58 AM	9:11 AM	0	0:00
4								22.38	51:0
00							Show	ing 1-10 out of 392 record	is
								-	

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?

Repsly allows your reps to fill out purchase faster, while reducing the amount of errors. ble to use the product monitoring features or prices, out of stock, product availability

> ck on the Gear Icon, located on the upper ht hand corner. Select **Products** and then ck the New Product button.

ter all mandatory data for this product. You also need to assign each product to a oduct group, which you can customize to ganize the products, however, makes the ost sense for your business.

ake sure the product is marked as ctive product". Click Save.

	_			
● System health 🏠 🚽	≜ ∣¢	Sanja 👻 🥐	Using products orders easier a	s in nd f
Schedule Reports Places Representatives Forms	NEW PRO	DDUCT 🔻	Your reps will k in Repsly to me and much mor	pe al pnito e.
APPLY	٧	/iew as: Plain list 👻		
1	PRICE	ACTIVE		Clic
	0.00	~		righ
nocolate Chip	0.00	~		clic
late Chip	0.00	*		
i	0.00	4		
hite Chocolate	0.00	4		Ent
5	0.00	~	2	will
SCA CAVA BRUT	24.00	4		org
SAL RESERVA RED 15	57.00	*		mo
DENCIAL RESV RED 1	60.00	*		
RED 2013	15.00		•••••	• • • •
	-			Ma
				"ac



System	1
S Places Representat	i
S active product	
Add tag:	PART -
•••••	

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.

> 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.

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.

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



2

.





	Q Quick find WHAT'S NEW	 System t 	ealth 🏟 - 🌲 🙌 Sanja - 🤗
	Interpolation Activities Actions Schere	dule Reports Places Representative	s Forms
	New retail audit		
••••	FreeFrash Audit	active retail audit 🛛 Auto-fill on open	SAVE - Cance
	Description:		
•		•	
•		•	
•	Built-in fields	•	
•	Product availability Product promoted	Product price	Select product groups and built-in
	Denotivet stock lavel	•	fields Select product groups which will be included i
		•	this retail audit and select built-in fields you'd to make available in this template.
	Set retail audit accessibility		
	Connected to places with any of these tags:		
	CVS x Start typing a place tag		
	Visible to these reps:		
•	Aanshika Khandelwal x Start typing rep's name		
••••	Questions & input fields		
	Field	MANDATORY 🕑	
	Add new field		
• • •	Products		
•	Search for products or groups already on the list		
•			
• • • • • • • • • •			



HOW TO USE ACTIVITIES TAB?

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

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

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

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.

	Q Quick fine		WHAT'S NEW		💿 System health 🏚 🚽 🏟 Sar
	🚸 re	psly	Activities Ac	tions Schedule Reports Places R	epresentatives Forms
•••••••••••••••••••••••••••••••••••••••	Place not	tes	01/01/2018 -	10/19/2018 - Add more filters : APPLY	View as:
	Place no	tes	• • • • • • • •		
	RE	PRESENTATIVE	DATE AND TIME	PLACE	NOTE
	Q De	rdre Stenson	10/17/2018 4:47 PM	Whole Foods Southie Old Colony Avenue 333, Boston, Massachusetts 02127, United States	"Spoke to the manager"
	Q Sar	ja Novotny	10/17/2018 3:56 PM	Old Trafford Sir Matt Busby Way, Stretford, England, United Kingdom	"Everything looks great. Make sure to come back in th
	Q Ler	Bruskiewitz	10/16/2018 12:54 PM	Gordon's Fine Wines and Liquors 39 Temple Place, Boston, Massachusetts 02111, United States	"Shelves need re-organizing. "
	Q De	rdre Stenson	10/15/2018 7:24 PM	Three D's 249 E St, Boston, MA 02127, United States	"Spoke to the manager"
	Q De	rdre Stenson	10/15/2018 2:16 PM	Whole Foods Southie Old Colony Avenue 333, Boston, Massachusetts 02127, United States	"Cold case fully stocked! 🛆"
	Q Ma	tthew Brogie	10/13/2018 4:47 PM	Brussard Beverage Company 8 Kingston Street, Boston, Massachusetts 02110, United States	"Checking note function"
	Q Ale	x Brussard	10/12/2018 12:21 PM	Brussard food company 83 Summer Street, Boston, Massachusetts 02110, United States	"Test"
	Q Sar	ja Novotny	10/10/2018 3:23 PM	Starbucks Coffee South Station 245 Atlantic Avenue, Boston, Massachusetts 02111, United States	"Everything looked great but make sure visit this place
	Q Ma	tthew Brogie	10/9/2018 11:18 AM	Alewife Grocers 11 Cambridgeside PI, Cambridge, Massachusetts 02141, United States	"Back door available 6:30am - 9:00am"
	Q De	rdre Stenson	10/5/2018 10:28 AM	Jim's Variety West 5th Street 256, Boston, Massachusetts 02127, United States	"Small store great selection 🛆"
	4				
	00		PORT		Showing 1-10 out of 106

2

3





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.

> 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.

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

Note at 49 Social	Write a comment	POST
	Deirdre Stenson 49 Social, 49 Temple Place, Boston, Massachusetts 02111, United States	10/23/2020 7:36 AM - 7:43 AM
	7:36 AM P Manager not in	
	Manager not in today will need to return next week.	
	Deirdre Stenson 49 Social 49 Temple Place Boston, Massachusetts 02111, United States	nent
	Višnja LAROME POINT j.d.o.o., Šestinski vrh 2d. Zagreb 10000, Croatia	10/22/2020 2:25 PM - 2:39 PM
	226 PM	
	Testing edit op	
	Marko Kovac	10/22/2020



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.

Click on the Activities tab.

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

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



Write a comment	POST
Deirdre Stenson 49 Social, 49 Temple Place, Boston, Massachusetts 02111, United States	10/23/2020 7:36 AM - 7:43 AM
7:36 AM	
····	
Manager not in today will need to return next week.	
Manager not in today will need to return next week. Deirdre Stenson 49 Social 49 Temple Place Boston, Massachusetts 02111, United States Manager not in today will need to return next week. 10/23/2020 7:36 AM Write a co	omment
Manager not in today will need to return next week. Deirdre Stenson 49 Social 49 Temple Place Boston, Massachusetts 02111, United States Arrive	omment POST
Manager not in today will need to return next week. Image: Deirdre Stenson 49 Social Pay Temple Place Boston, Massachusetts 02111, United States Image: Višnja LAROME POINT j.d.o.o., Šestinski vrh 2d, Zagreb 10000, Croatia	omment POST
Manager not in today will need to return next week. Deirdre Stenson 49 Social 49 Temple Place Boston, Massachusetts 02111, United States Višnja LAROME POINT j.d.o.o., šestinski vrh 2d, Zagreb 10000, Croatia $\boxed{10/23/2020 7:36 AM}$	omment POST
Manager not in today will need to return next week. 10/23/2020 7:36 AM 49 Social 49 Temple Place Boston, Massachusetts 02111, United States Višnja LAROME POINT j.d.o.o., Šestinski vrh 2d. Zagreb 10000, Croatia 10/23/2020 7:36 AM 10/23/2020 7:36 AM	omment POST
Manager not in today will need to return next week. Deirdre Stenson 49 Social 30/23/2020 7:36 AM ()) 20 Triple Place Boston, Massachusetts 02111, United States Višnja LAROME POINT j.d.o.o., Šestinski vrh 2d, Zagreb 10000, Croatia () () () () () () () () () ()	omment POST



HOW TO CREATE YOUR SALES DOCUMENTS?



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

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

	Q Quick find WHAT'S NEW
	Activities Actions Schedule Reports
	Manage your account and Repsly settings
	Data management
er	 Tags Rename tags, merge tags together or erase them. Organize your tags by your own needs. Territories Group your representatives and places by territories
	31 Delete scheduled events Delete scheduled events for all or specific representatives Sales
	Sales documents Configure your sales document
e	Products Define products that you use in your organization
	Pricelists Set up products assortment for your stores
	Custom Info Management
	Custom Attributes Use custom attributes to customize your places
••••••••••••••••••••••••••••••••••••••	Status Add and edit statuses
	California



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.

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





	Q Quick find	WHAT'S NEW		System
	🚸 repsly	Activities Actions	Schedule Reports	Places Representative
	Sales de Configure yo	OCUMENTS our sales document		
 • • • • • • • • •				
	NAME			
	Q Order			
	Q Credits			
	Reconciled Orders			
	Asset Ordering			
	Q Return			
	Q POS Ordering			
	_			



HOW TO ASSIGN PRICE LISTS TO YOUR SALES DOCUMENTS



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

Select Sales documents. Click on the Sales **Document type** you want to assign your **Price**

	Q Quick find									
	Tepsly Activities Actions Schedule Reports									
	Settings Manage your account and Repsly settings									
	Data management									
	Rename tags, merge tags together or erase them. Organize your tags by your own needs.									
	Group your representatives and places by territories									
	31 Delete scheduled events Delete scheduled events for all or specific representatives									
	Sales									
••••	Sales documents Configure your sales document									
•	Products Define products that you use in your organization									
	Pricelists Set up products assortment for your stores									
	Custom Info Management									
	Custom Attributes Use custom attributes to customize your places									
	Status Add and edit statuses									
	Callinaa									





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.

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.

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?

Click on the Gear icon and then click on Settings.

Now choose **Application Settings**.

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.





Q Quick find	WHAT'S NEW					System healt	r 🖻	\$	\$ -	Sanja
🔷 repsly	Activities	Actions	Schedule	Reports	Places	Representatives	Forms	5		
Set up optio	ntion settin	gs p will be used	1.						SAV	E
Localization	Localization			ount for:						
Places			 Sales docu Only sales 	iment items and document total	sales docume	nt total				
Representatives			\bigcirc Nothing							
Time & Mileage		- H			h a s					
Forms			If turned on your displayed on s	com sales doc ou will be able to	ument num o have your cu	Der Istom sales document				
Sales documents			displayed on a	ales documents						
Schedules			Use proc If turned on ye	duct images ou will be able to	o upload and c	display images on prod	ucts			
Photos										
Territories										
Electronic signate	ure									



HOW TO FILTER AND EXPORT YOUR SALES DOCUMENTS?

Click on the Activity Tab.

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.



2





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.

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

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



Actions Schedule
0 · 04/30/2020 ▼ Add mo
006-20
031-20
73-20
72-20
71-20
70-20
005-20
004-20
69-20
68-20