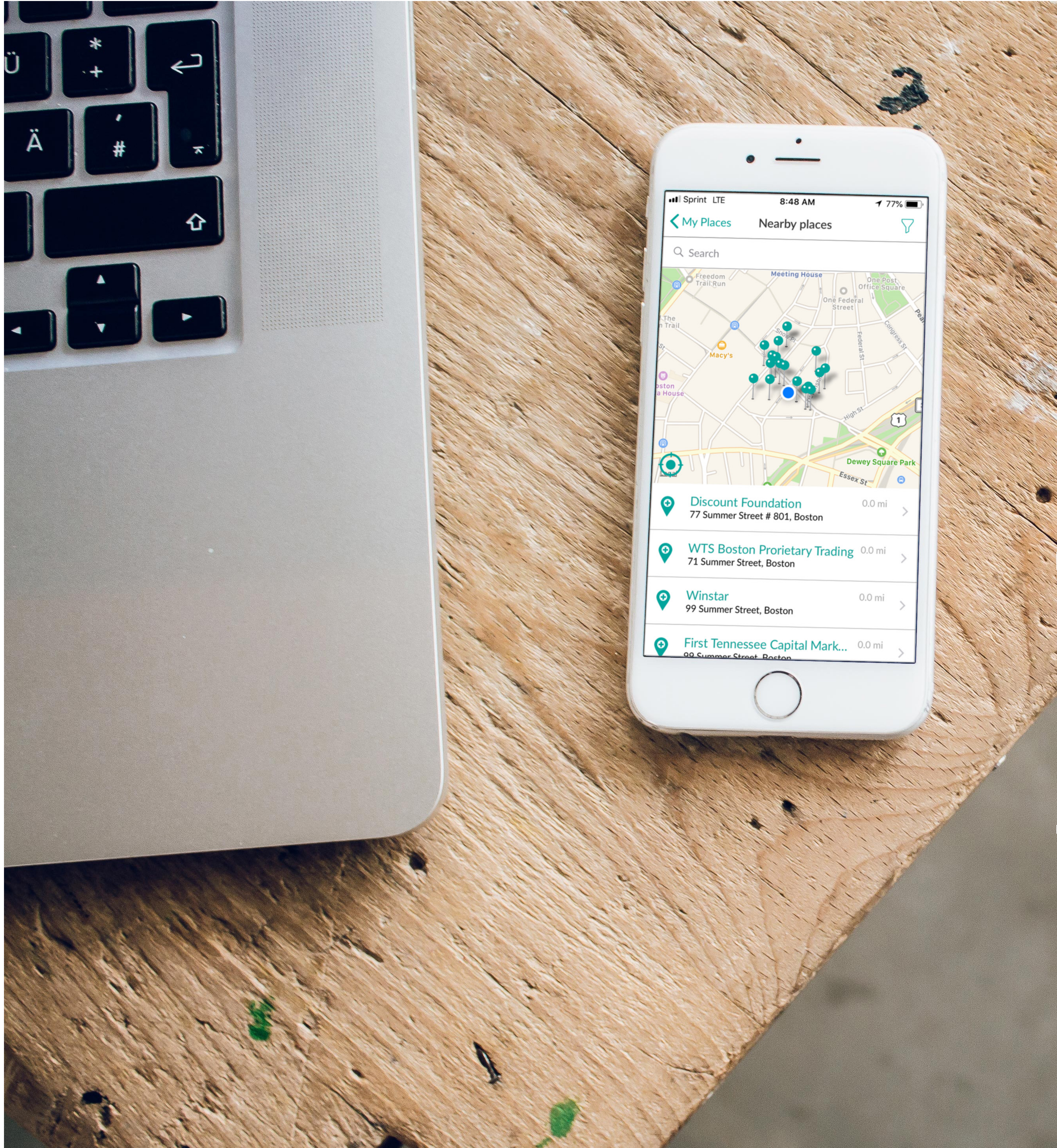
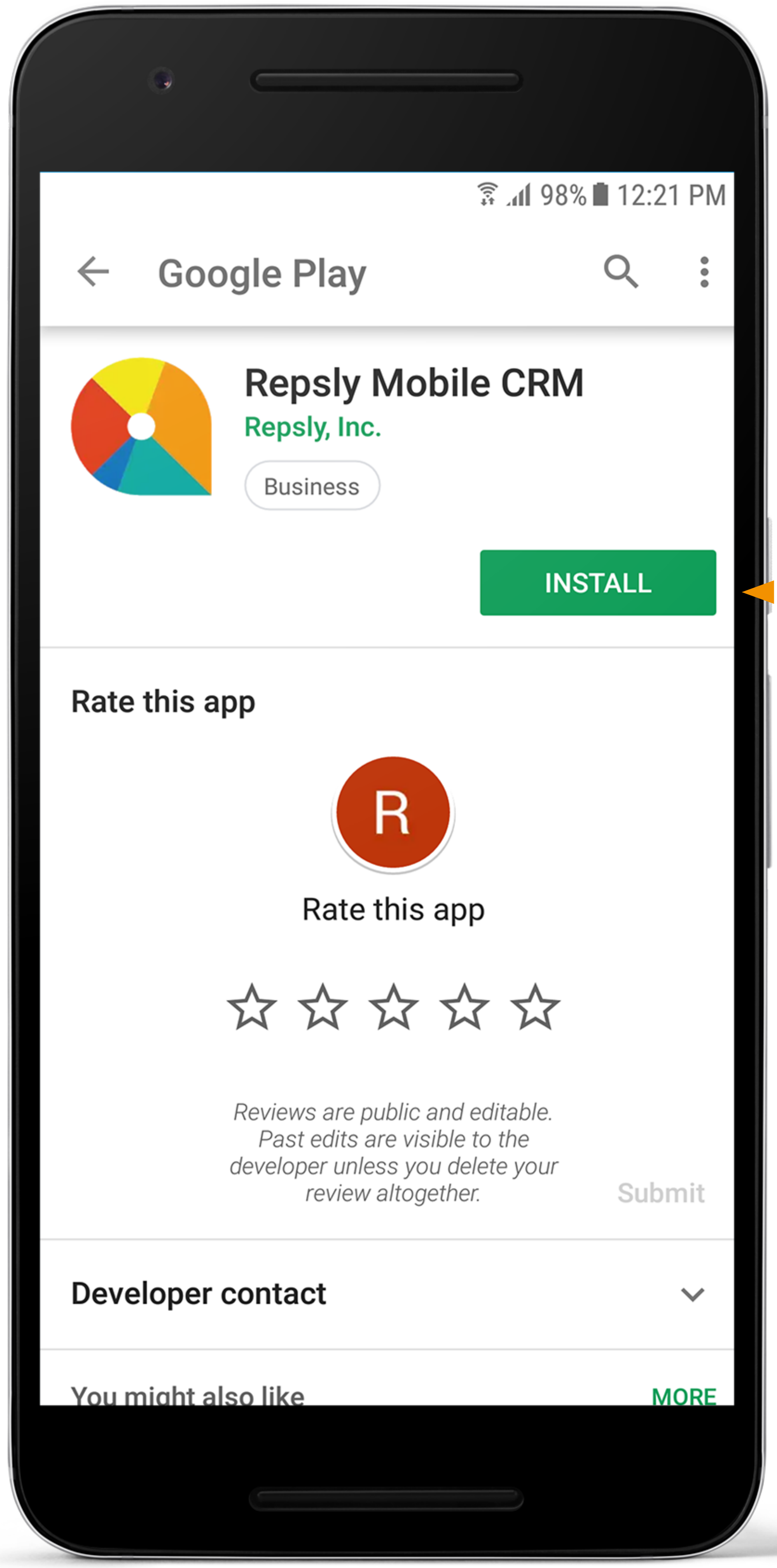


Repsly™

REPRESENTATIVE TRAINING GUIDE

Mobile App

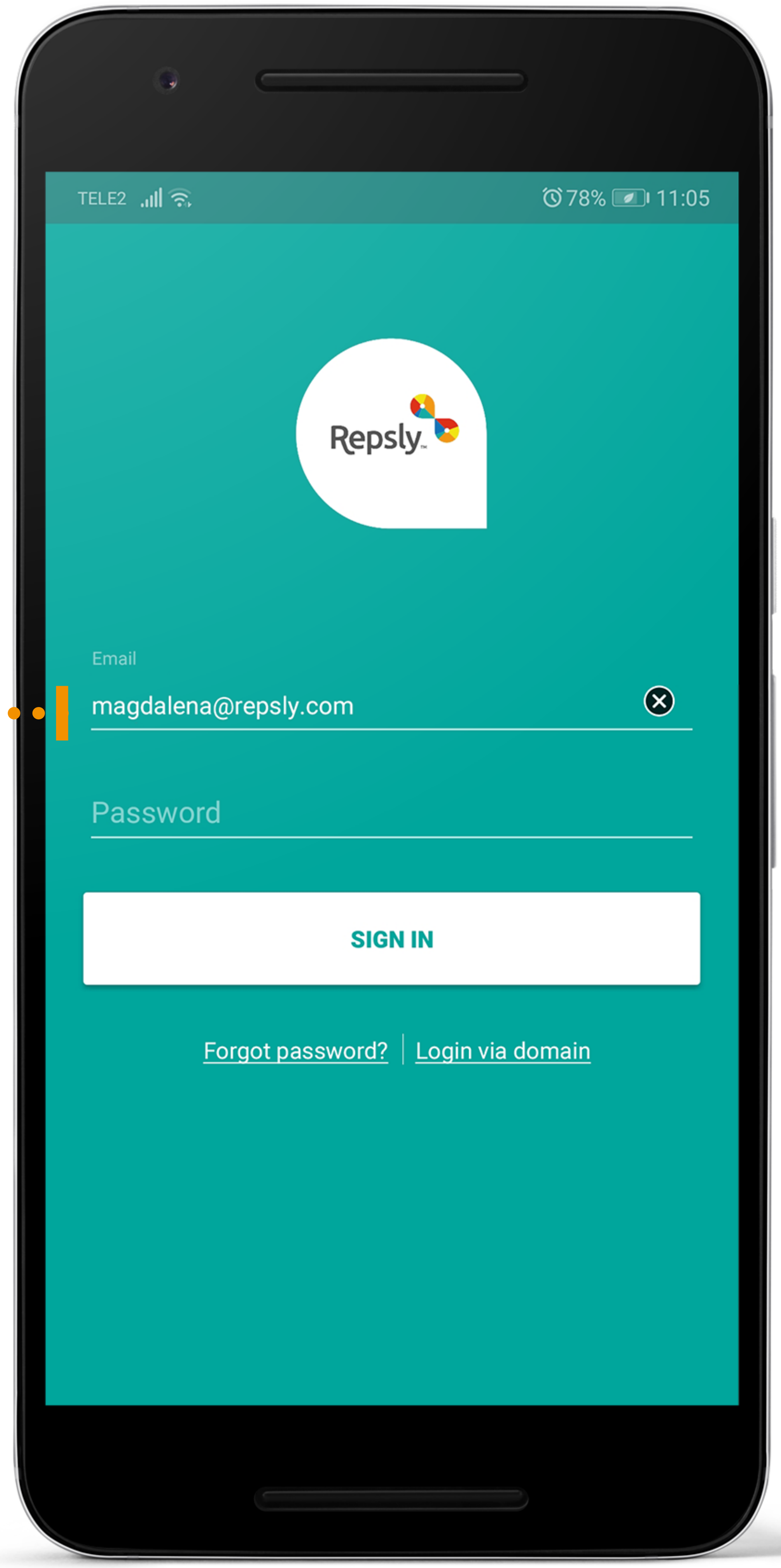


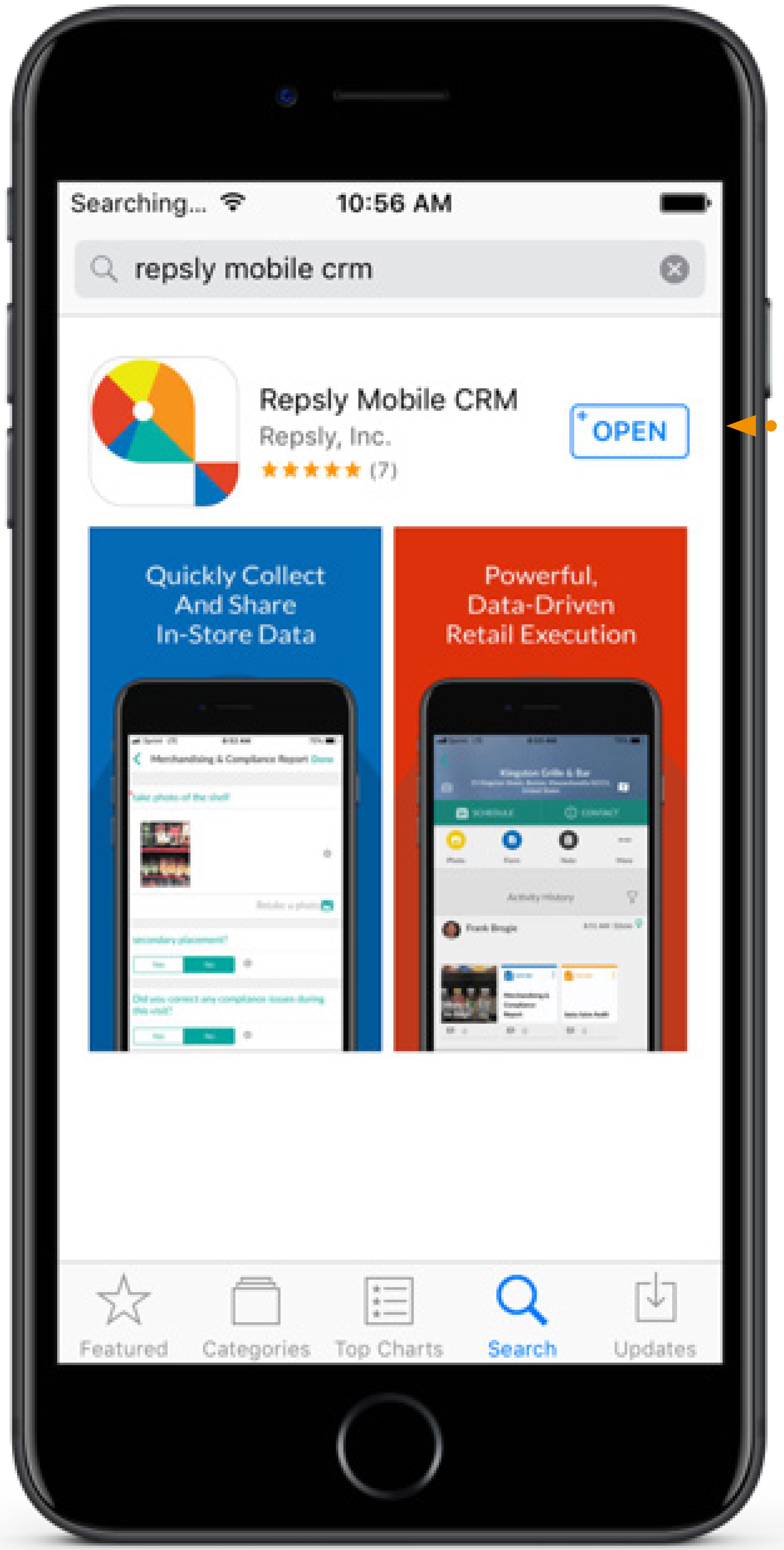
HOW TO INSTALL REPSLY ON ANDROID?

1. Tap on the **Google Play** icon and search for **Repsly Mobile CRM**. Press on the **Install button**.

2. Press on the **Open Play button** and then **Get started buton**.

3. After you fill in credentials to login, click on **Sign in**.



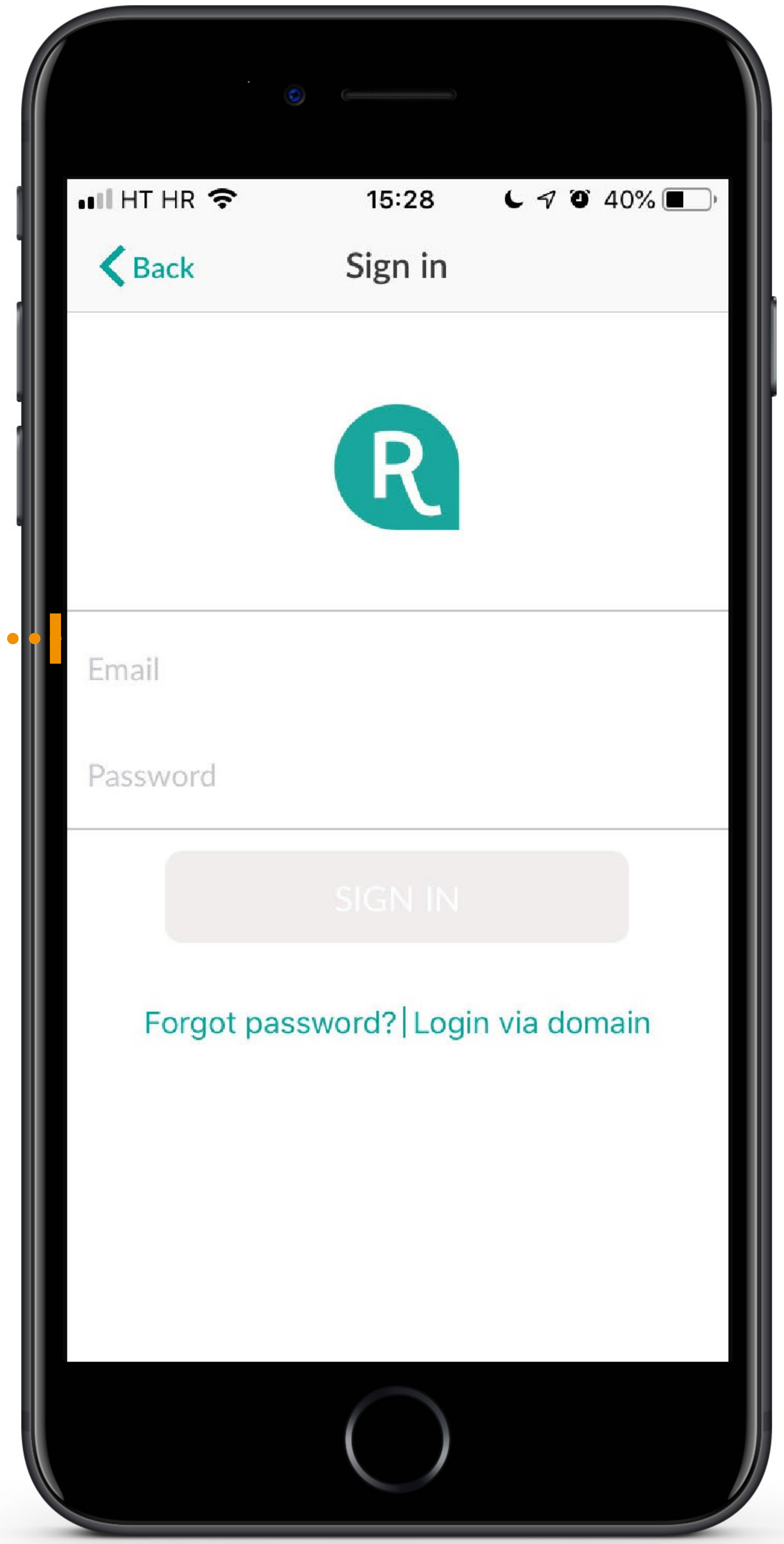


HOW TO INSTALL REPSLY ON iOS?

1. Tap on the **Apple store icon** and search for **Repsly Mobile CRM**. Press on the download icon and then press on the **Open button**.

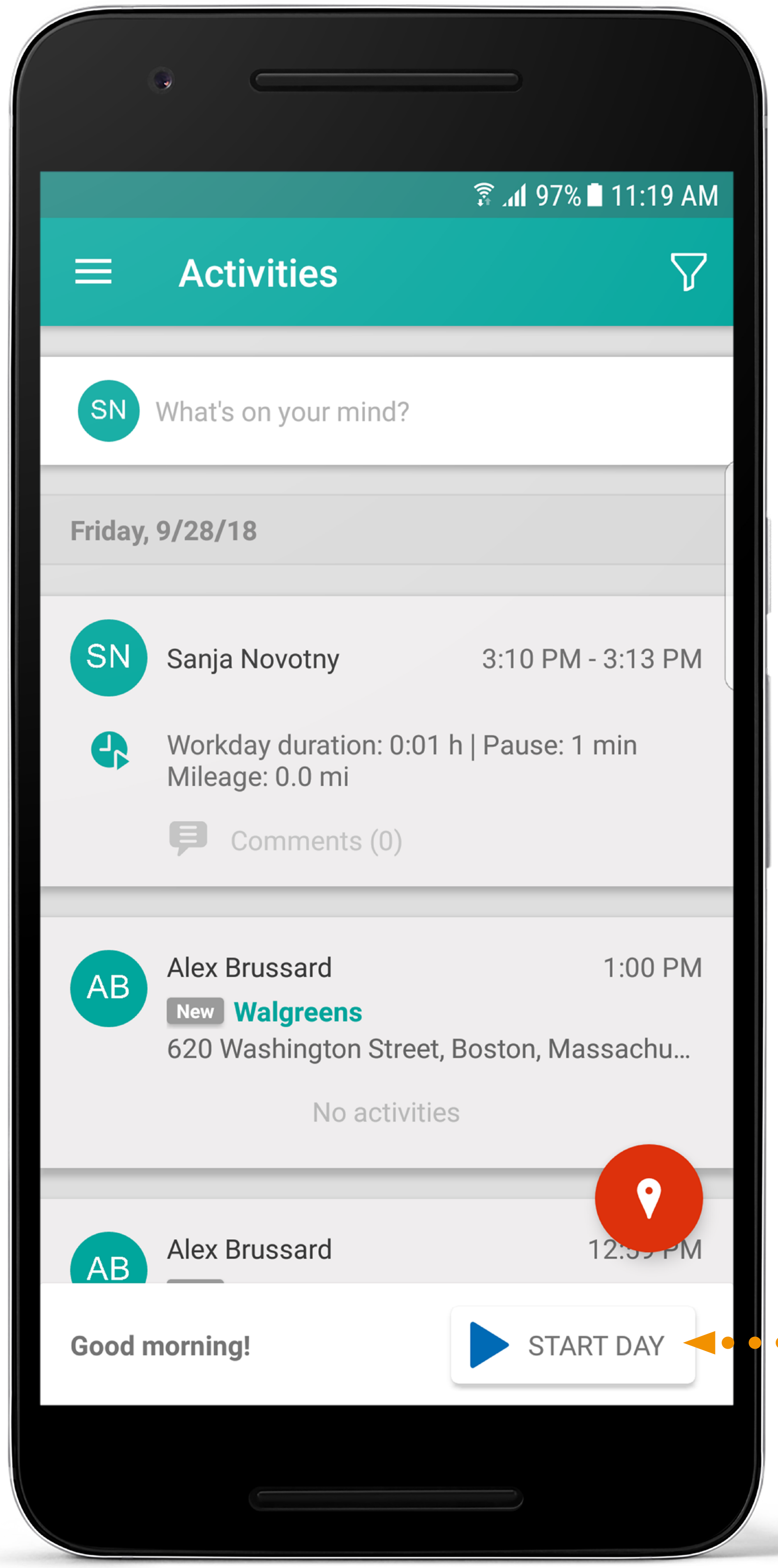
2. Press on the **Get started button**.

3. After you fill in credentials to login, click on **Sign in**.



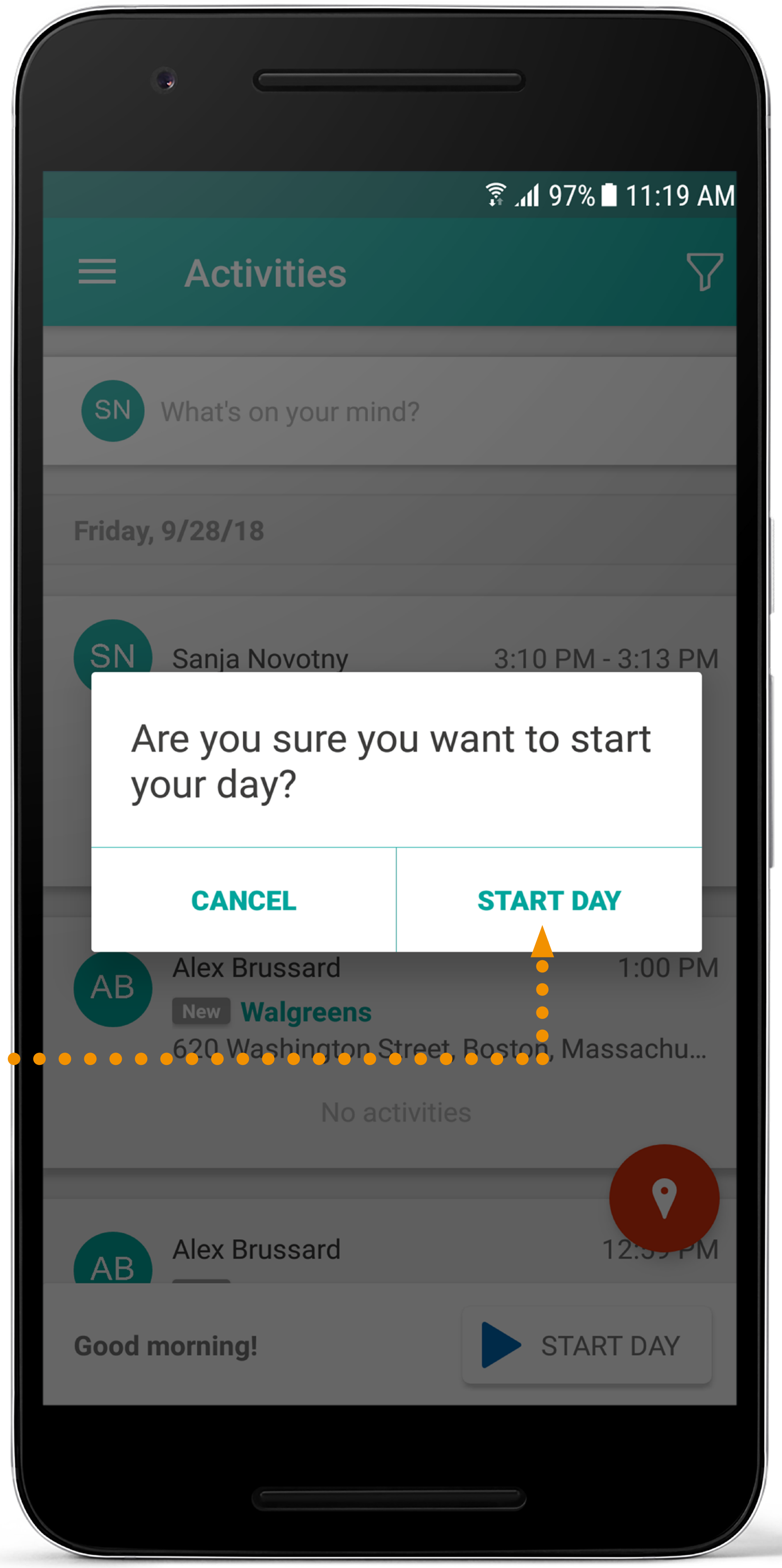
HOW TO START YOUR DAY?

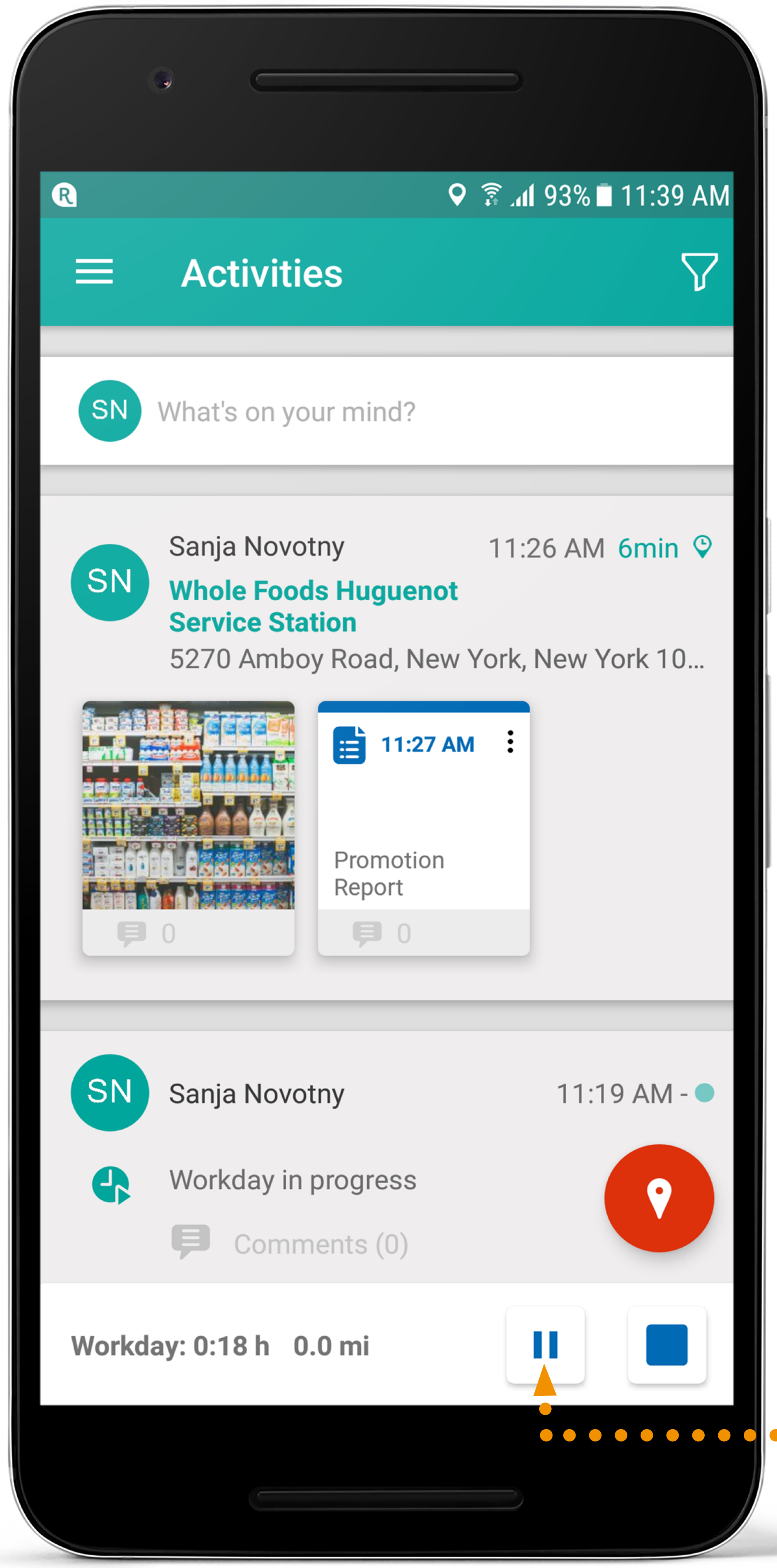
Repsly offers the ability to keep track of your working hours and mileage.



1 Click on the **Start Day Button.**

2 Your day will start after clicking on **Start Day**.





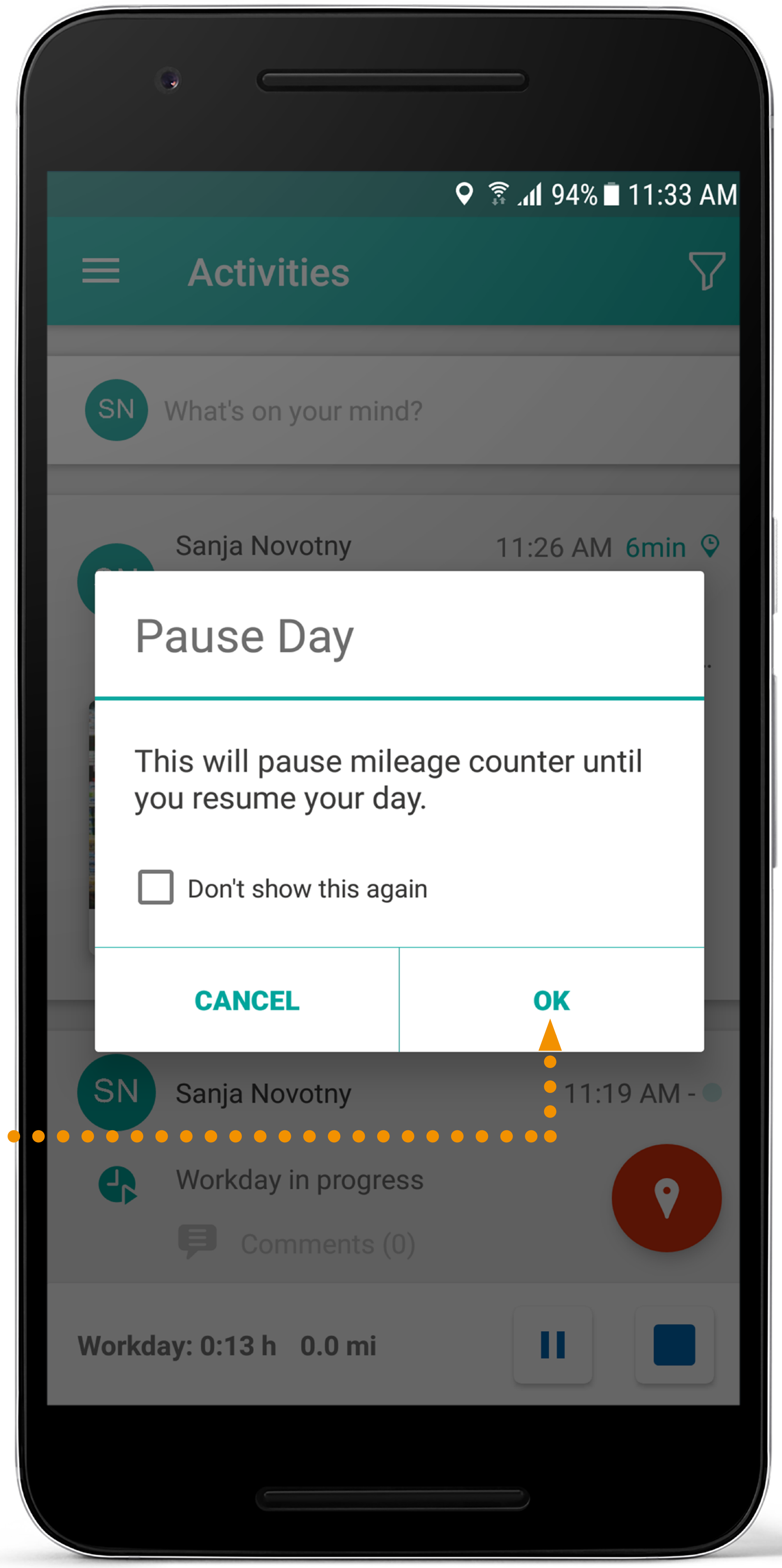
HOW TO PAUSE YOUR DAY?

After starting their day, field reps now have the option to take a break at any time.

Please make sure to pause your day so we can accurately capture hours worked.

1 Click on the **Pause sign**.

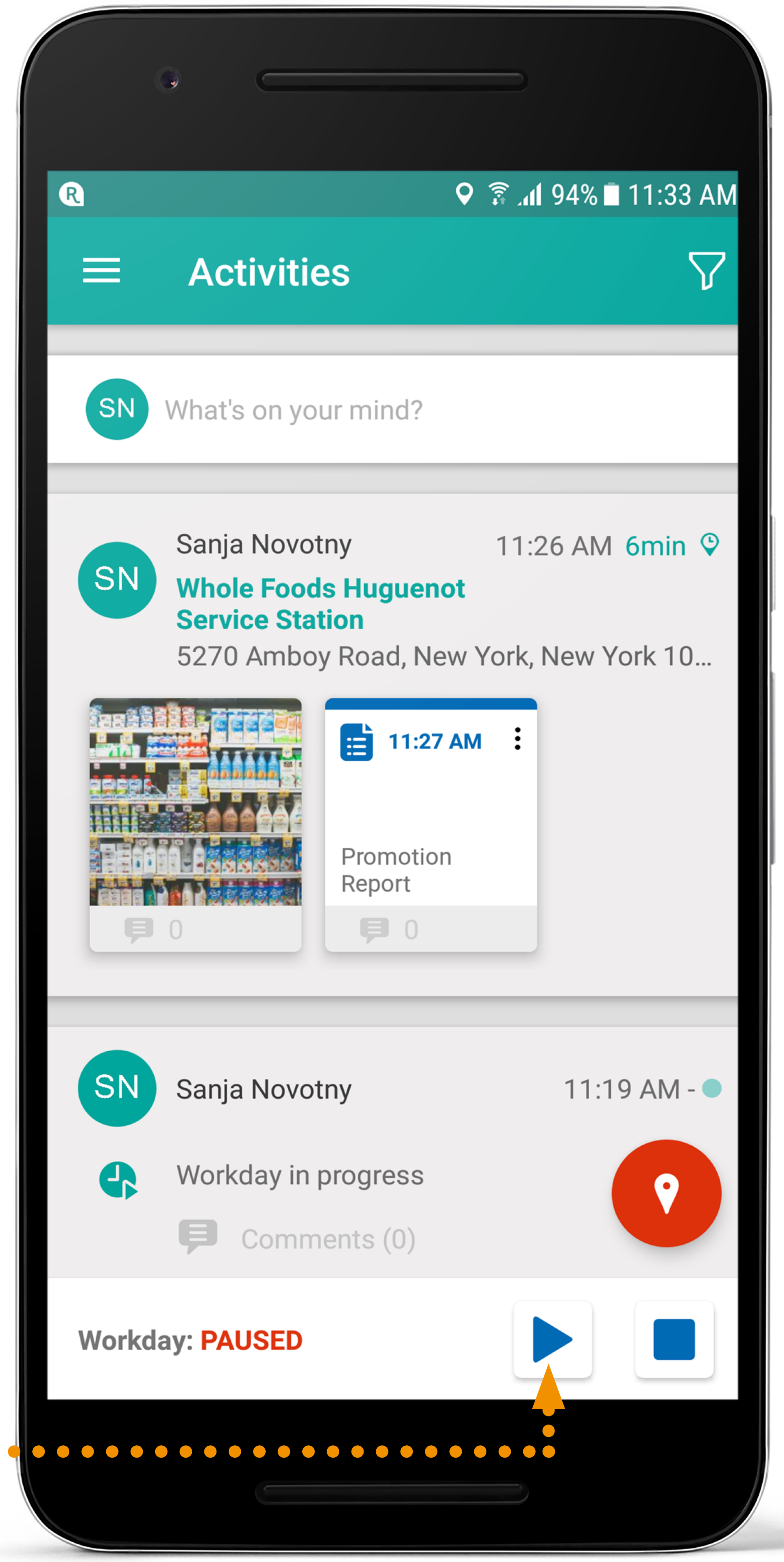
2 Select **OK** at pop up window.

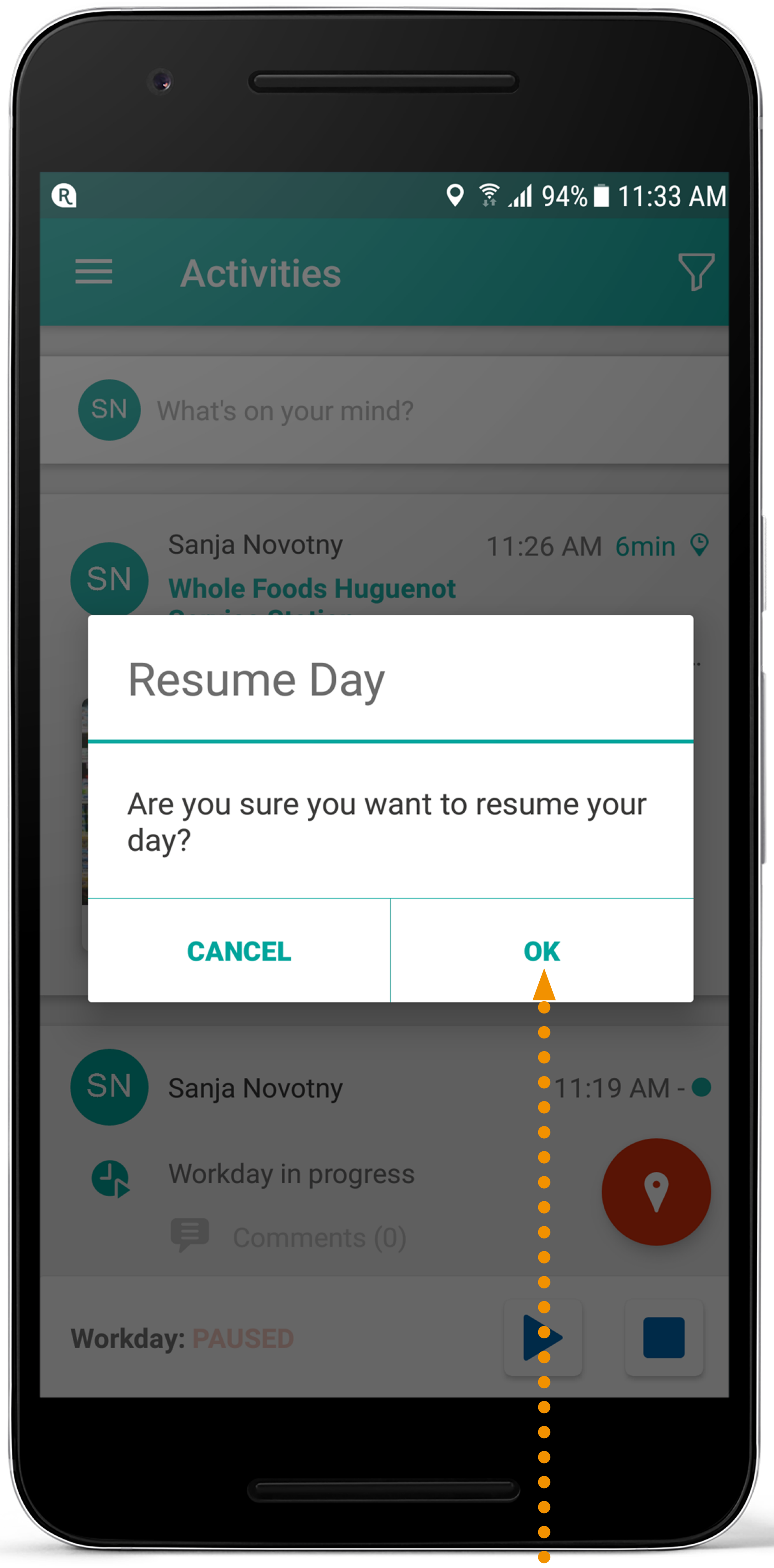


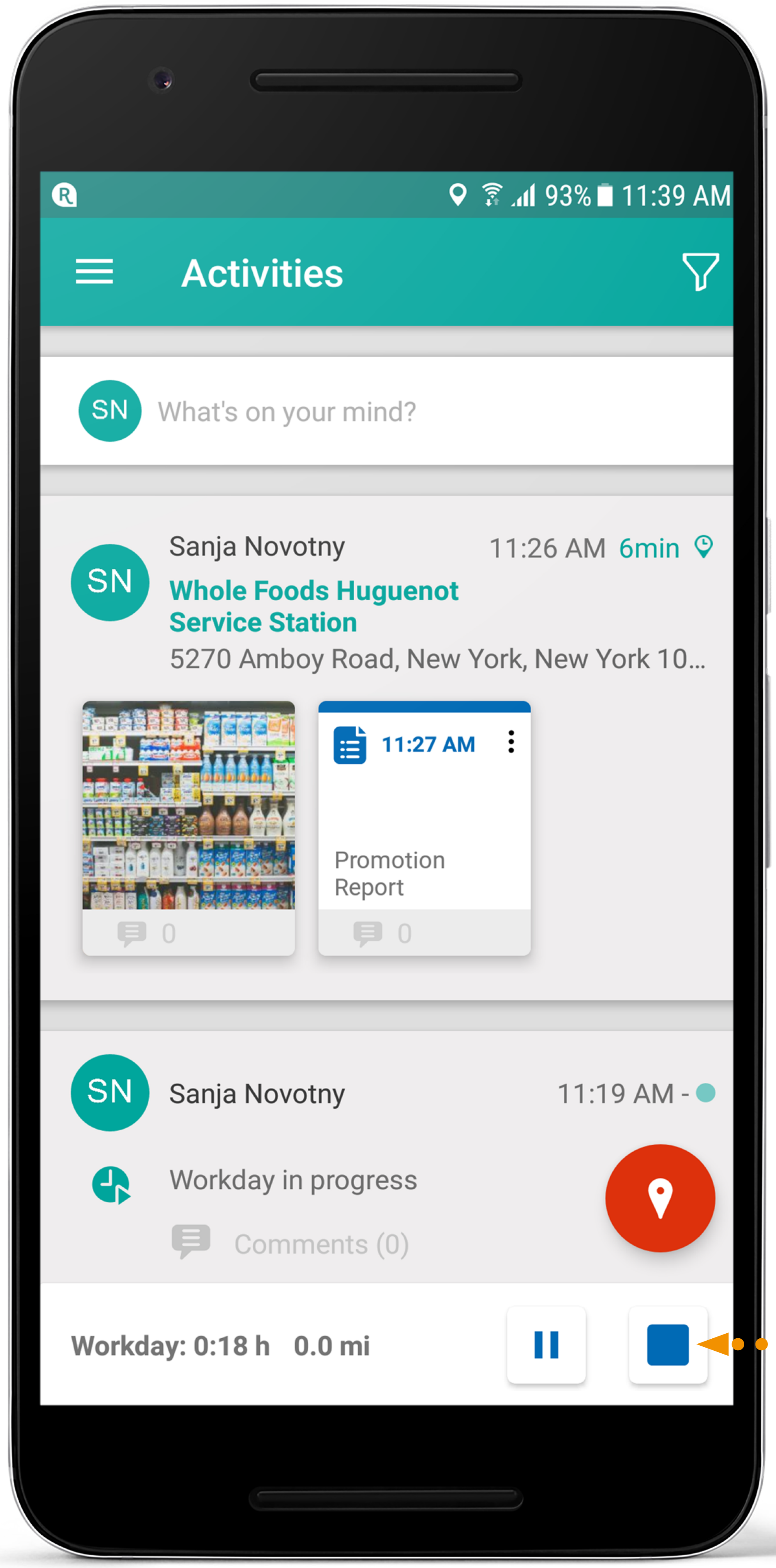
In order to resume his workday, the rep must:

1. Tap the **Play button** in the Activities feed menu.

2. Select **OK** at pop up window. Reps workday is now resumed.





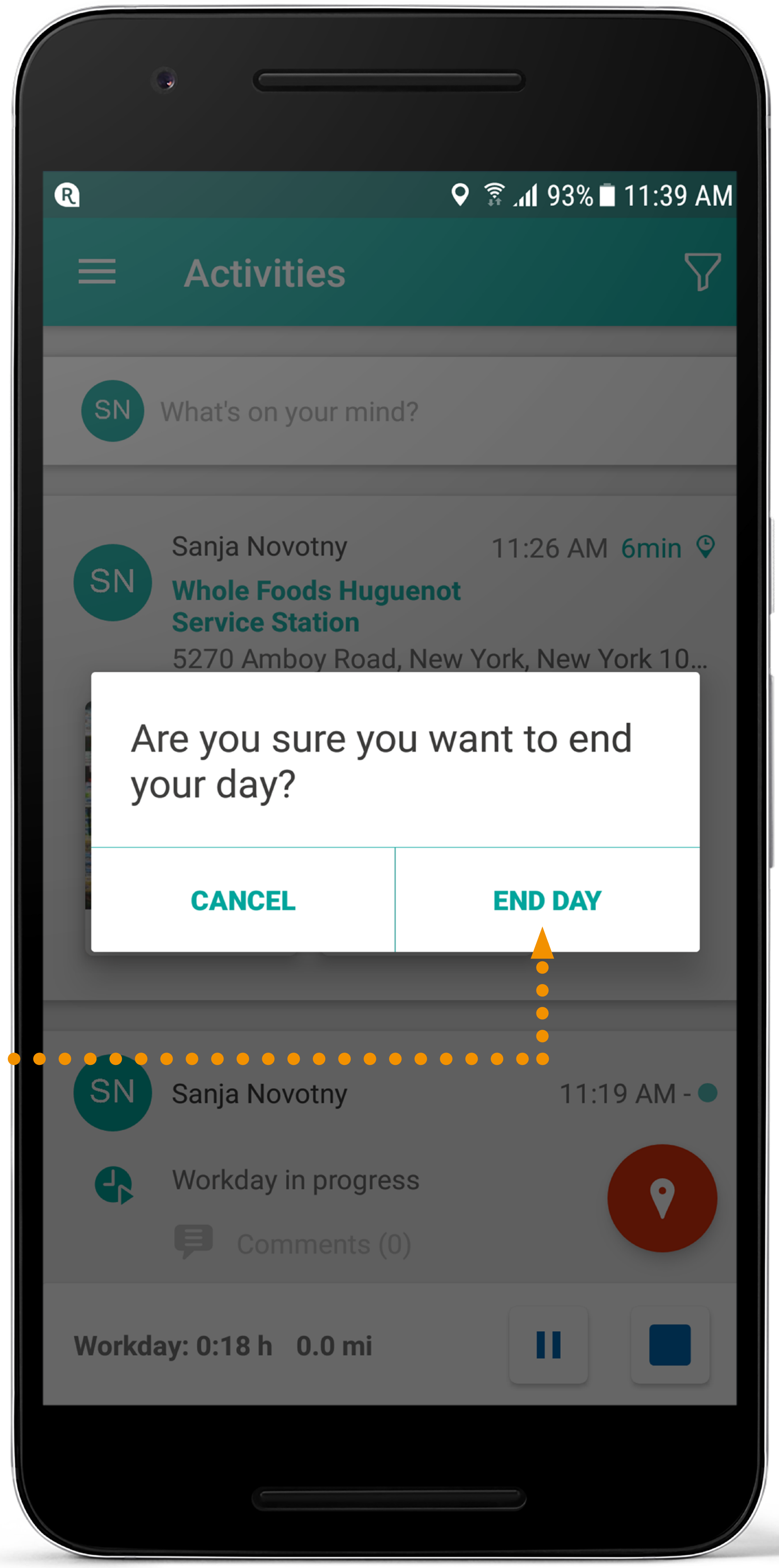


HOW TO END YOUR DAY?

**Once you end your day, you cannot restart it.*

1 Click the **Stop** button in the bottom right corner.

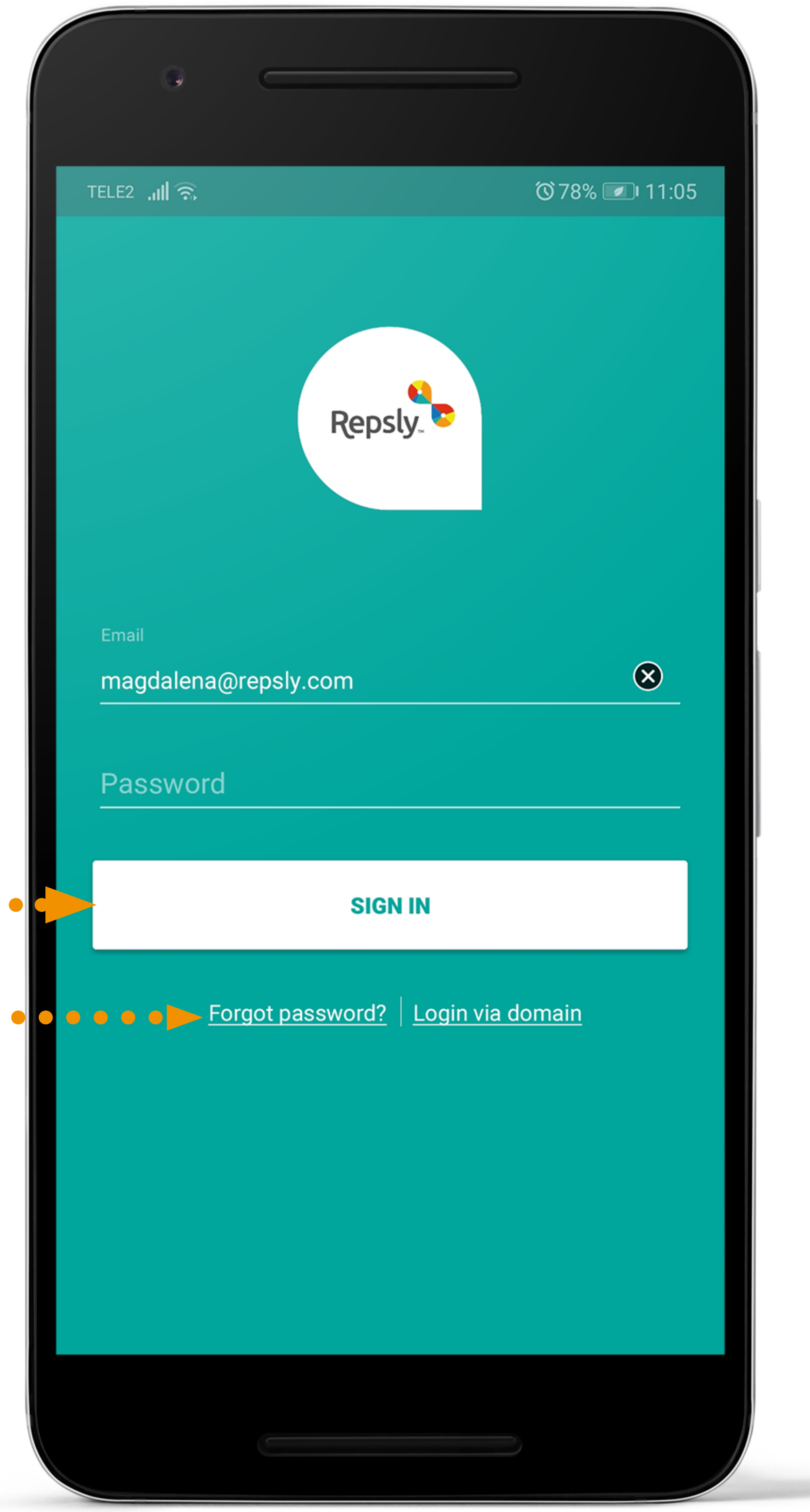
2 Click **End Day**. Your day has now been ended.



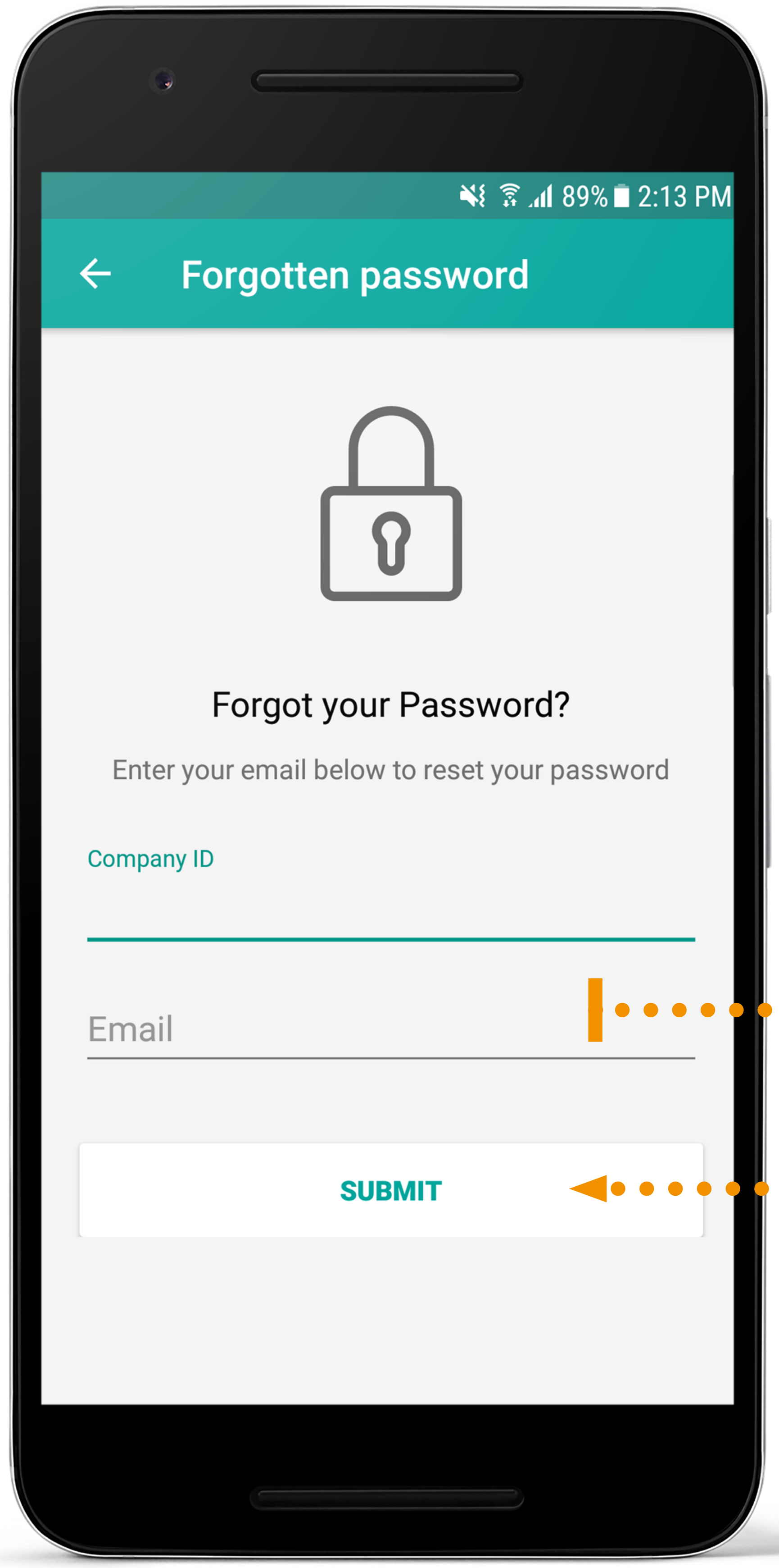
HOW TO CHANGE YOUR PASSWORD?

Passwords can be changed on the mobile app.

This is a setting inside your account.



1 Click on an option Forgot password that you will see below the Sign in button.

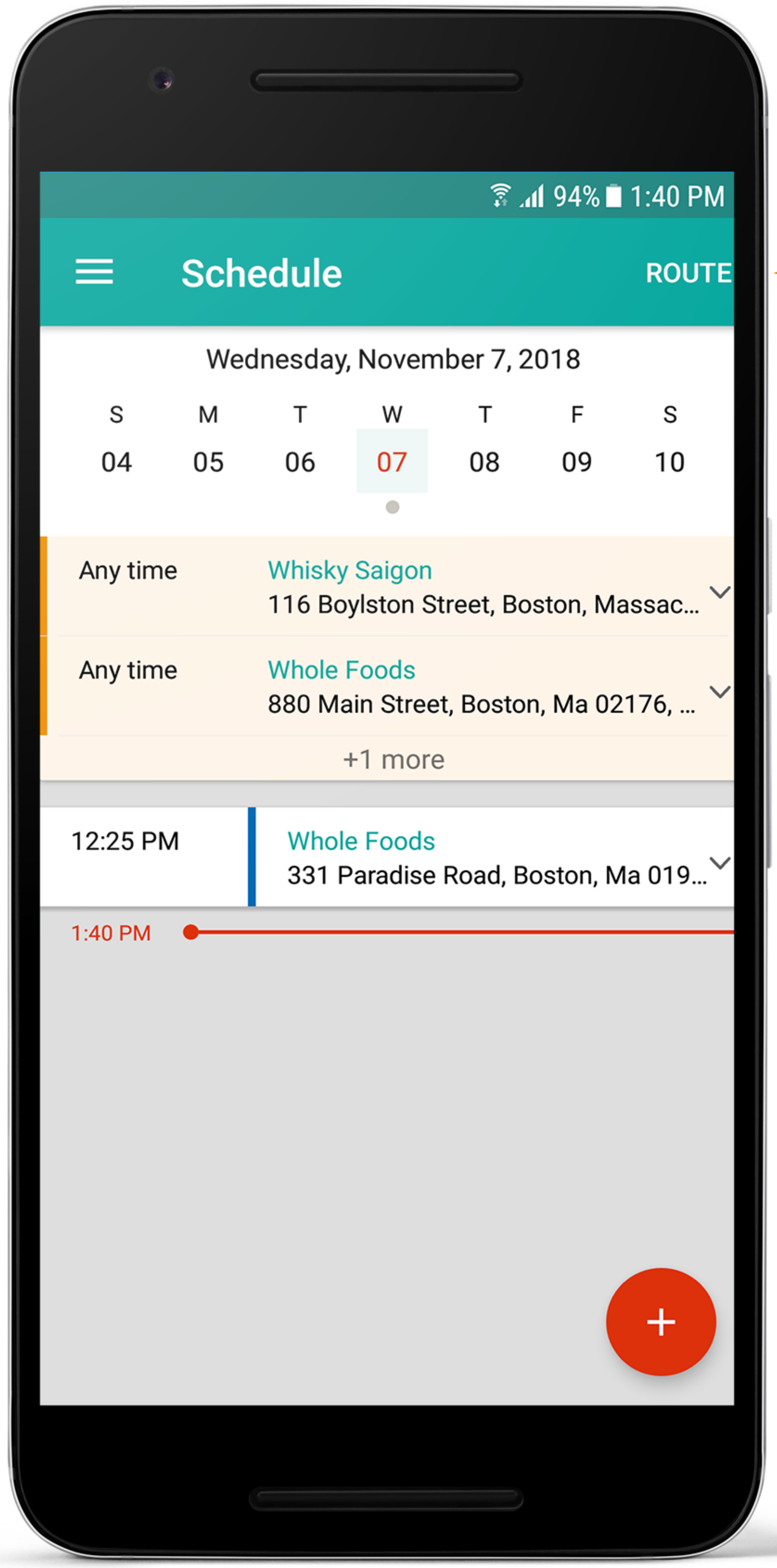


2 Enter your company ID and the e-mail address associated with your account.

3 Click on Submit and you will be forwarded to enter your new password and confirm it.

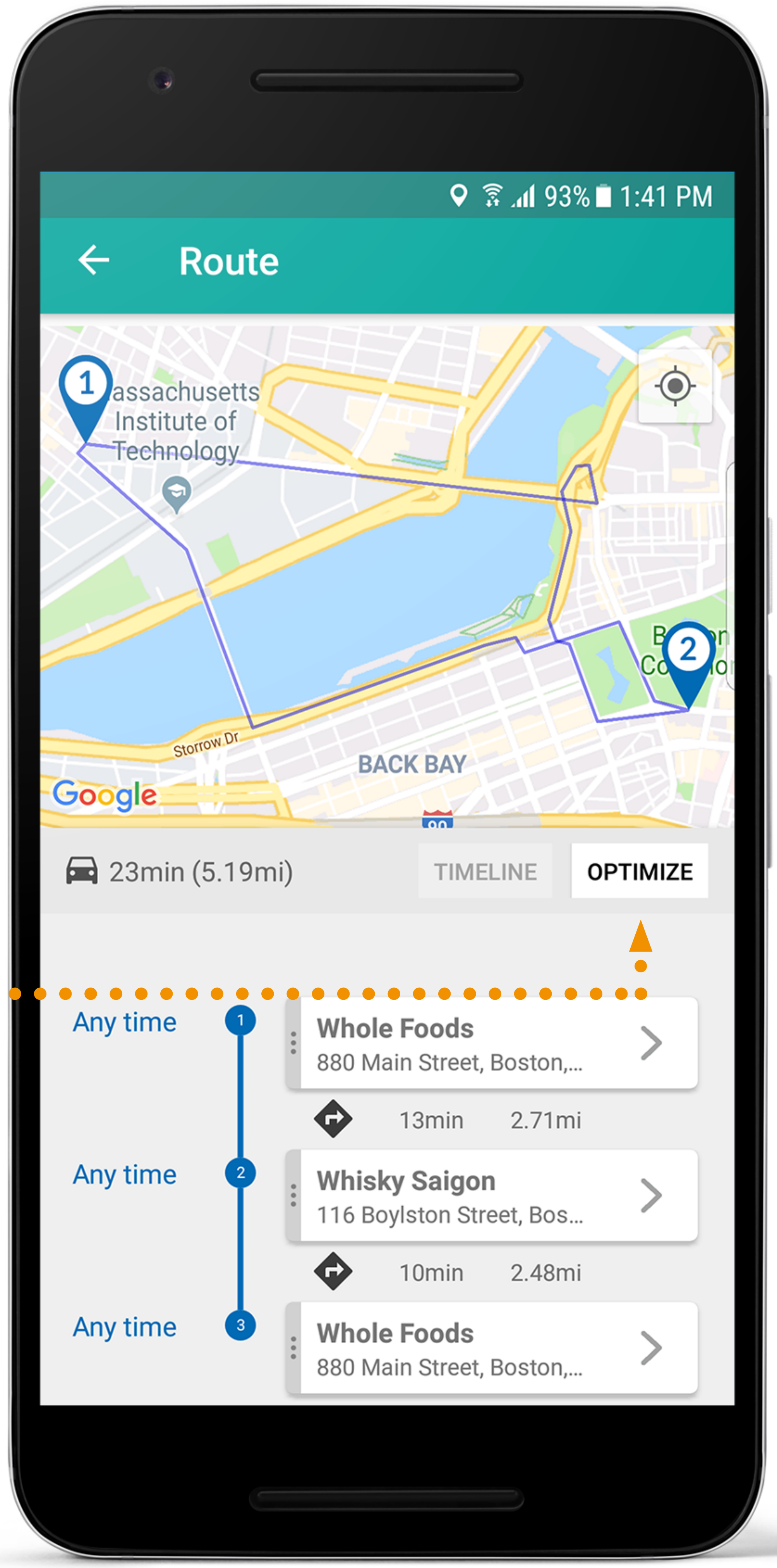
HOW TO OPTIMIZE MY ROUTE?

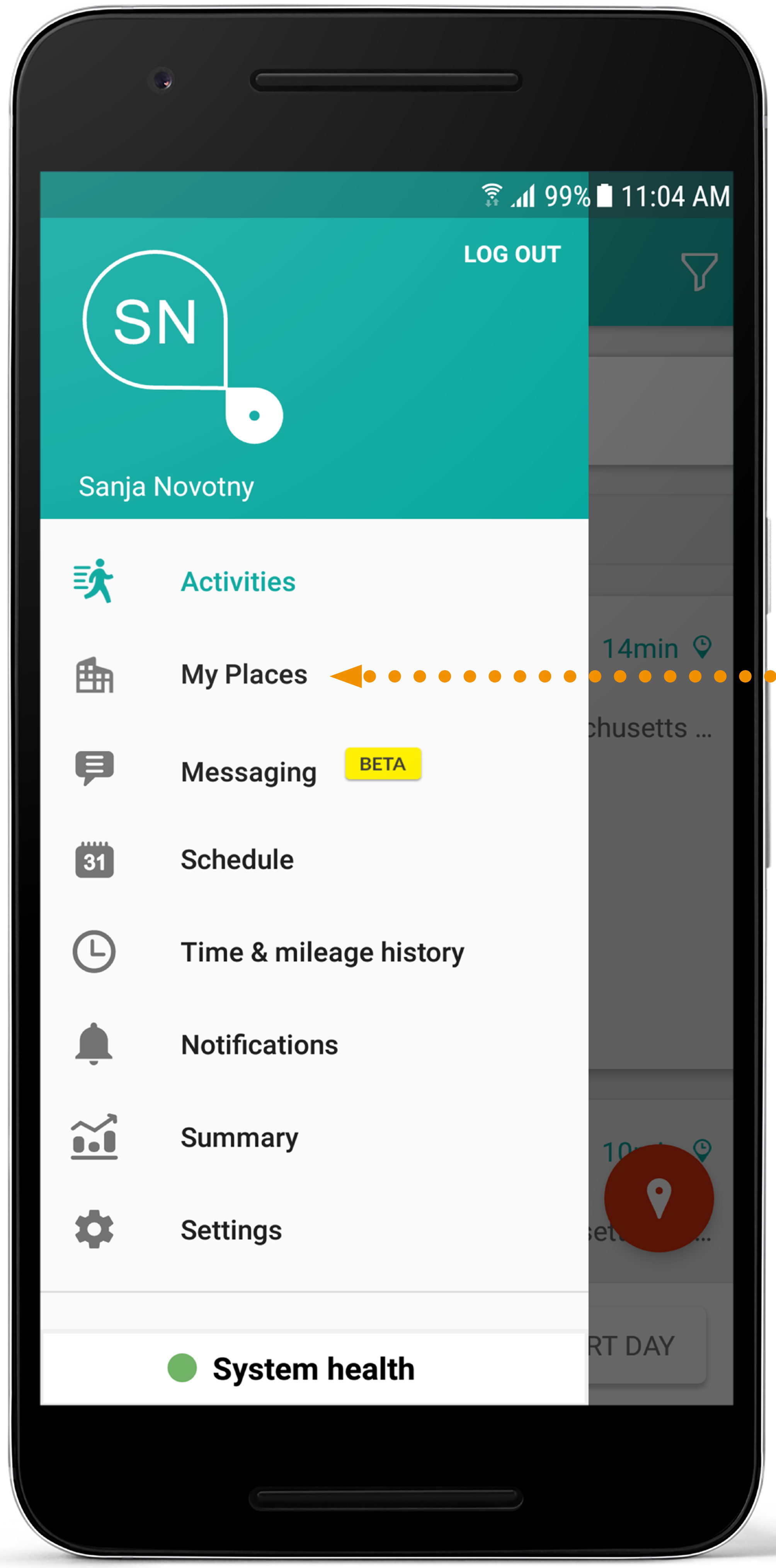
Using this tool your team can arrange their visits on the go in a way that either follows their schedule (Timeline button) or takes mileage into account (Optimize button).



1. On the schedule tab, choose the day you want to optimize your route for. Press the **Route button**.

2. To optimize your route, press the **Optimize button**. You can also drag and drop your different visits to make your own route.





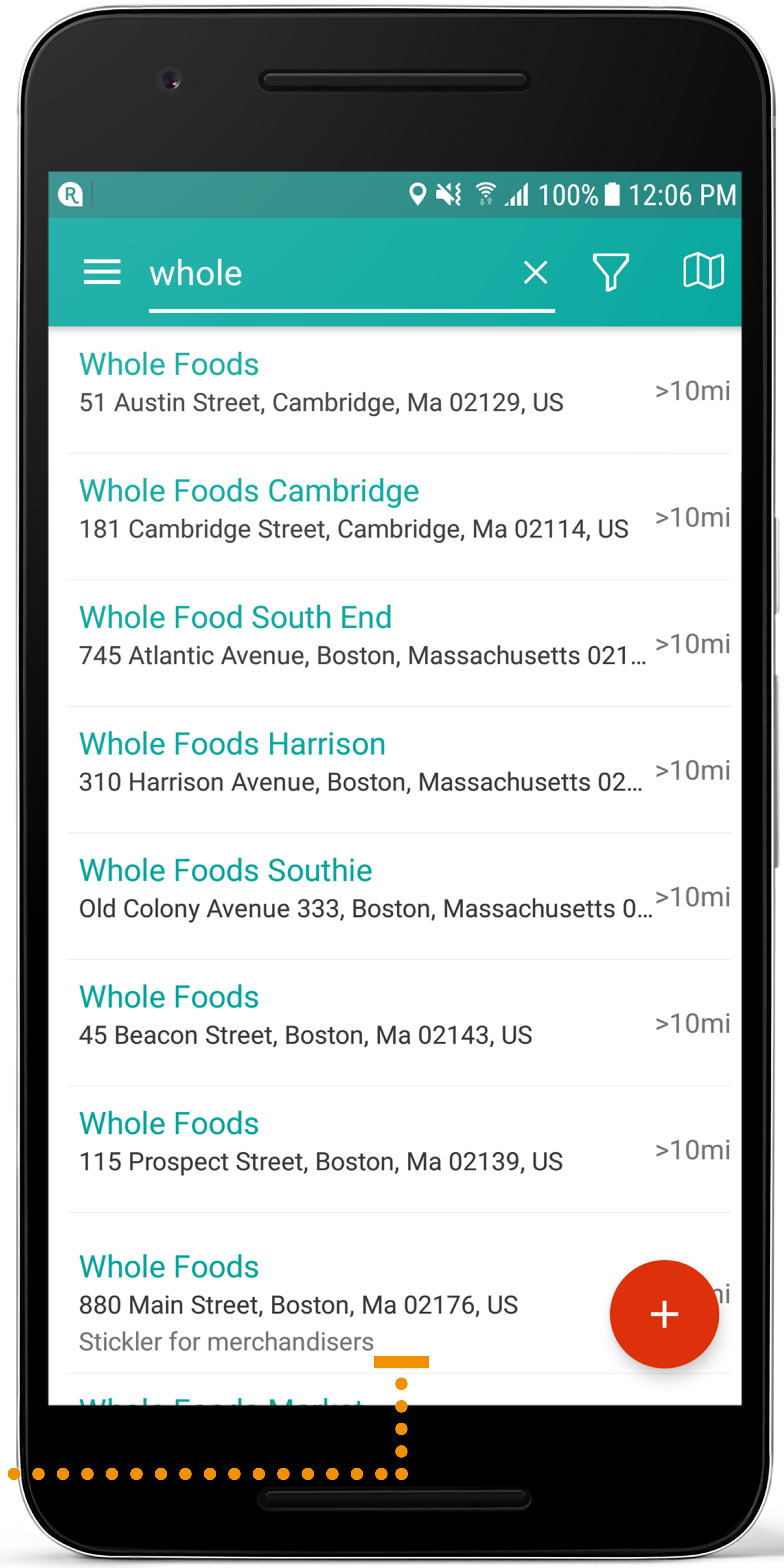
HOW TO USE SCHEDULE?

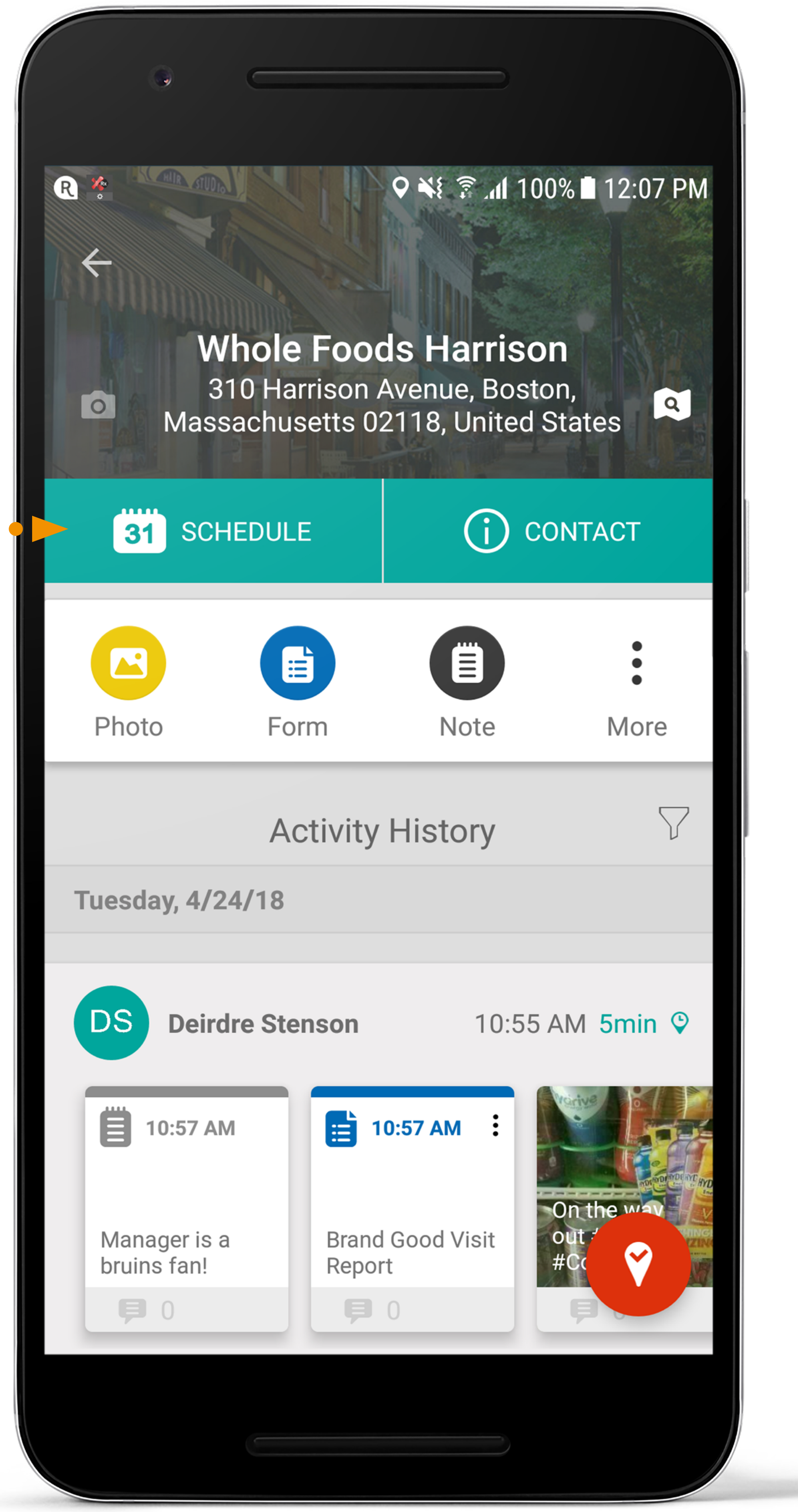
With permission, reps are allowed to create and manage their visits on their mobile devices.

This allows them to proactively manage their day from the field.

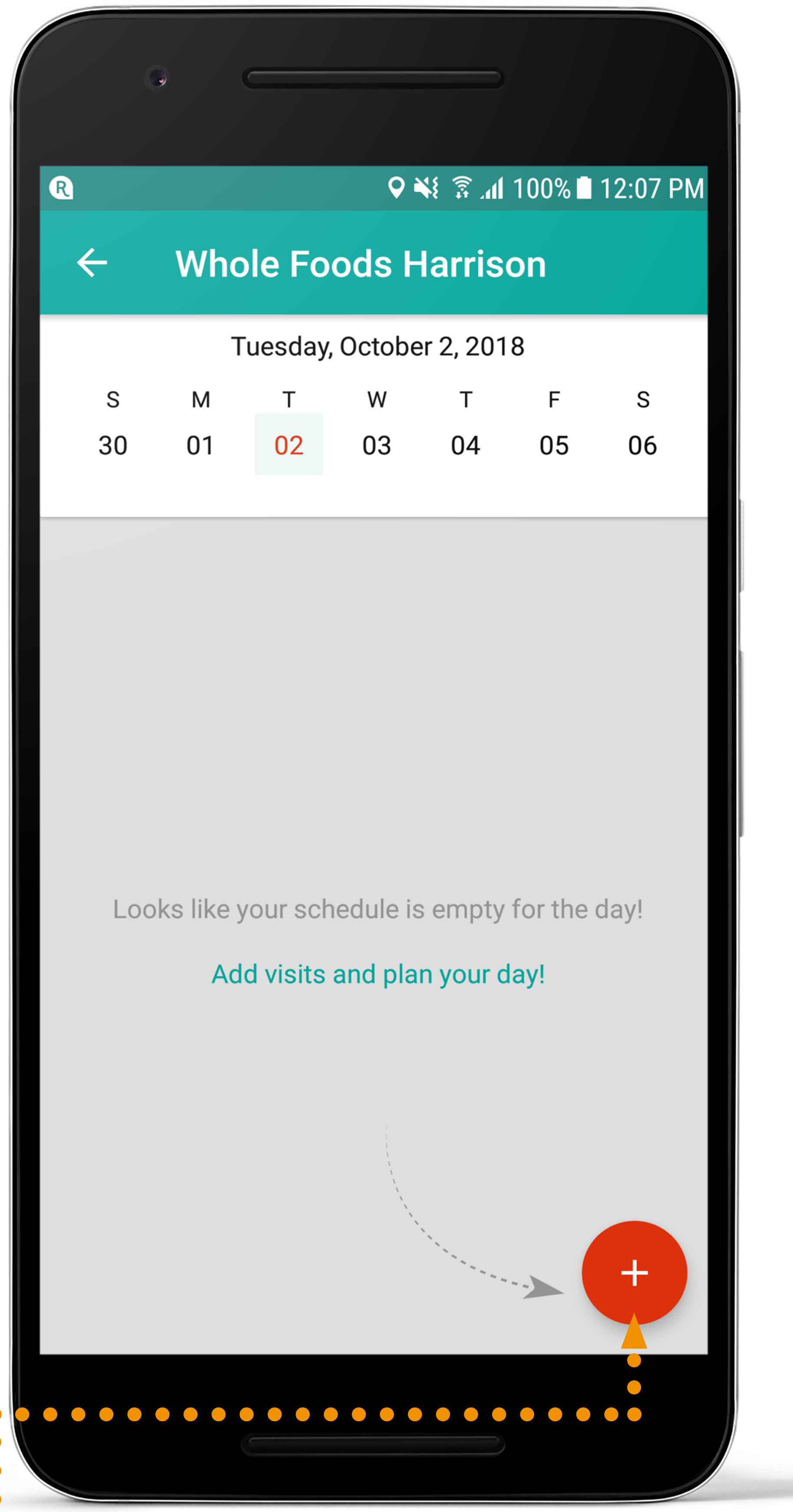
1 Click on the **My Places** tab.

2 Select the **place** you wish to **schedule** a visit for.

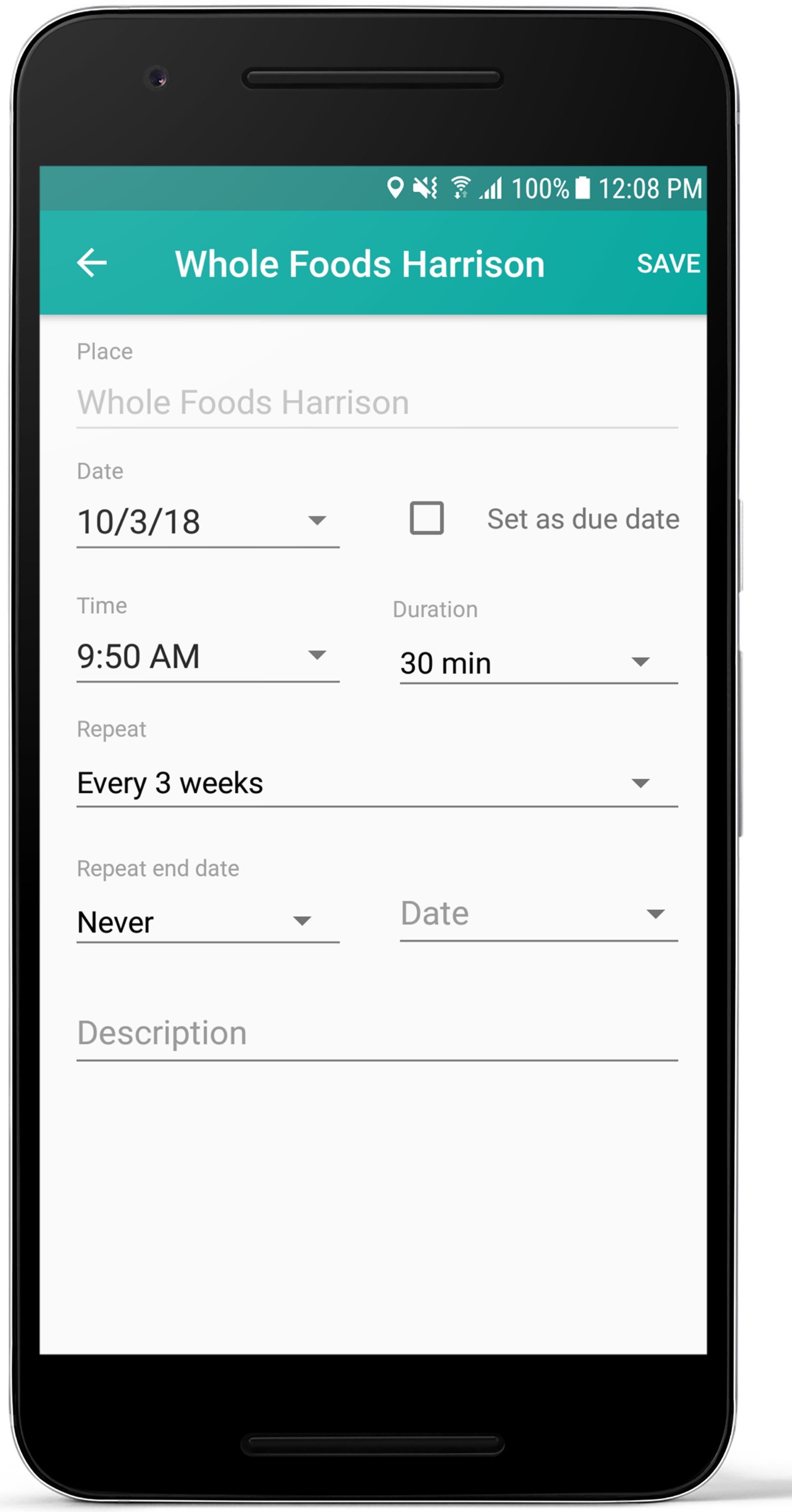




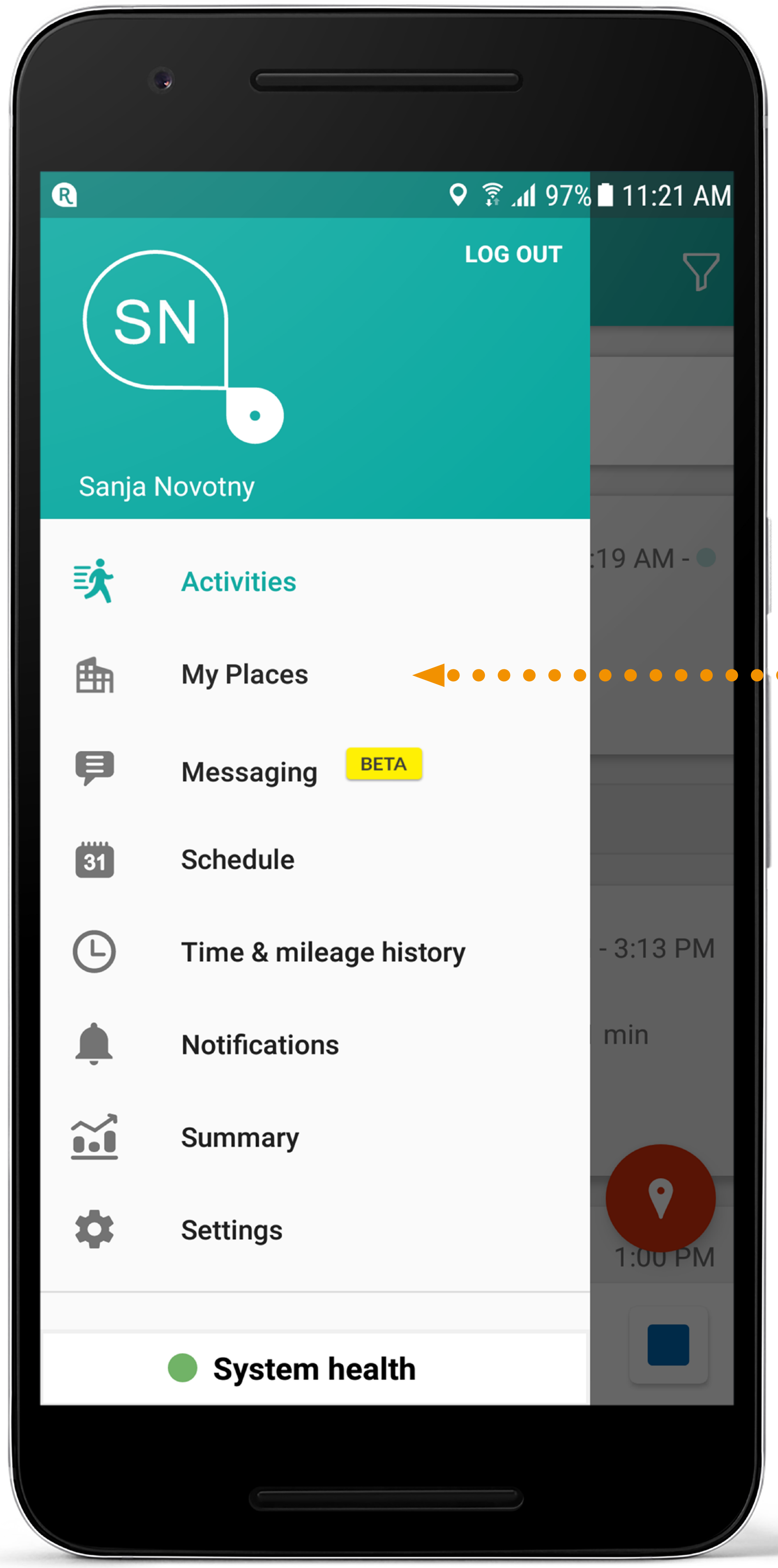
3 Click the **Schedule** heading at the top of the page.



4 Open the schedule and click the **red + icon** to schedule a new visit.



5 This will allow you to select the **date and time** for the visit. On this page, reps can also select whether or not the visit is recurring and **leave a note** for themselves about the visit.



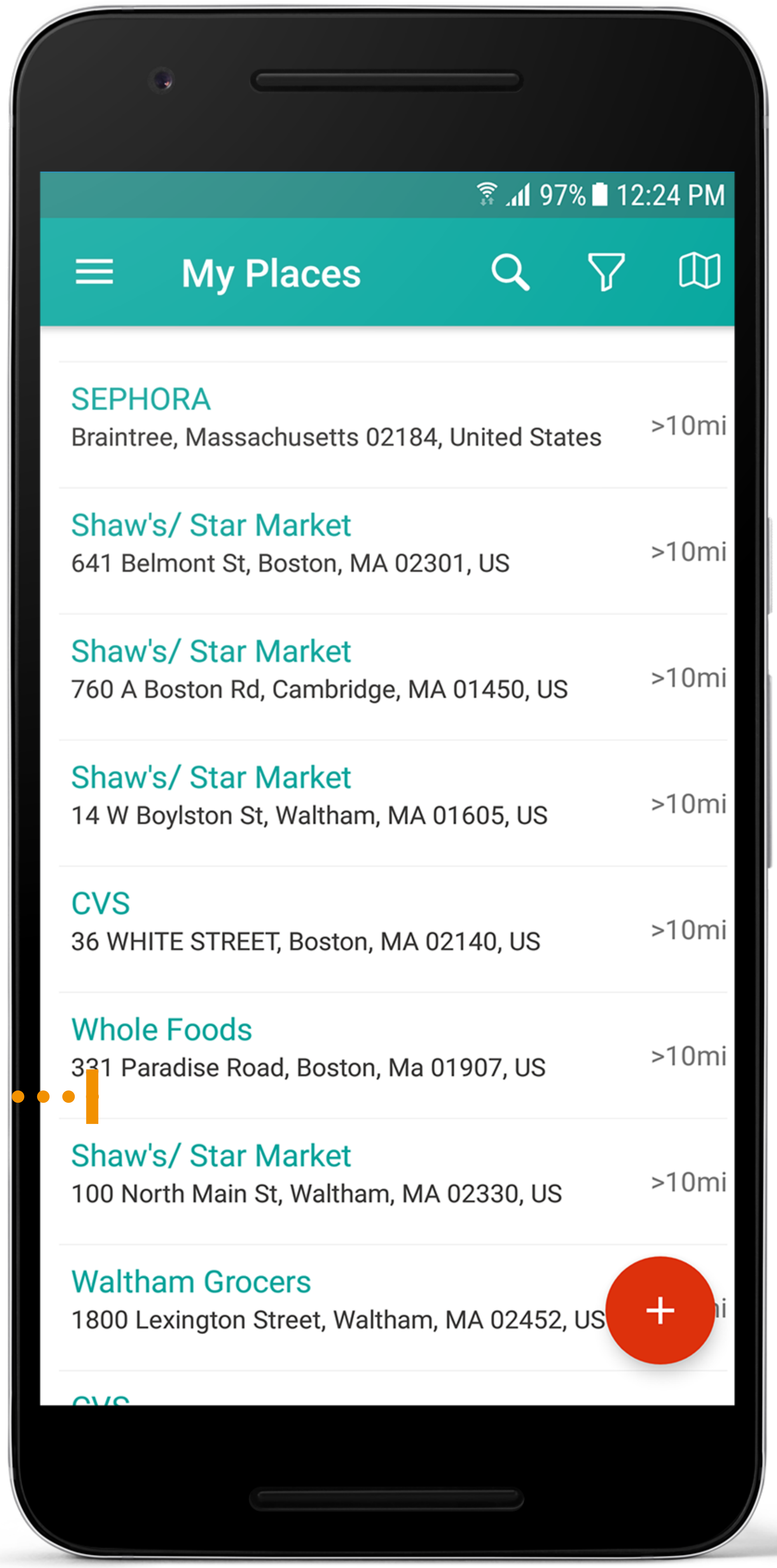
HOW TO CHECK IN?

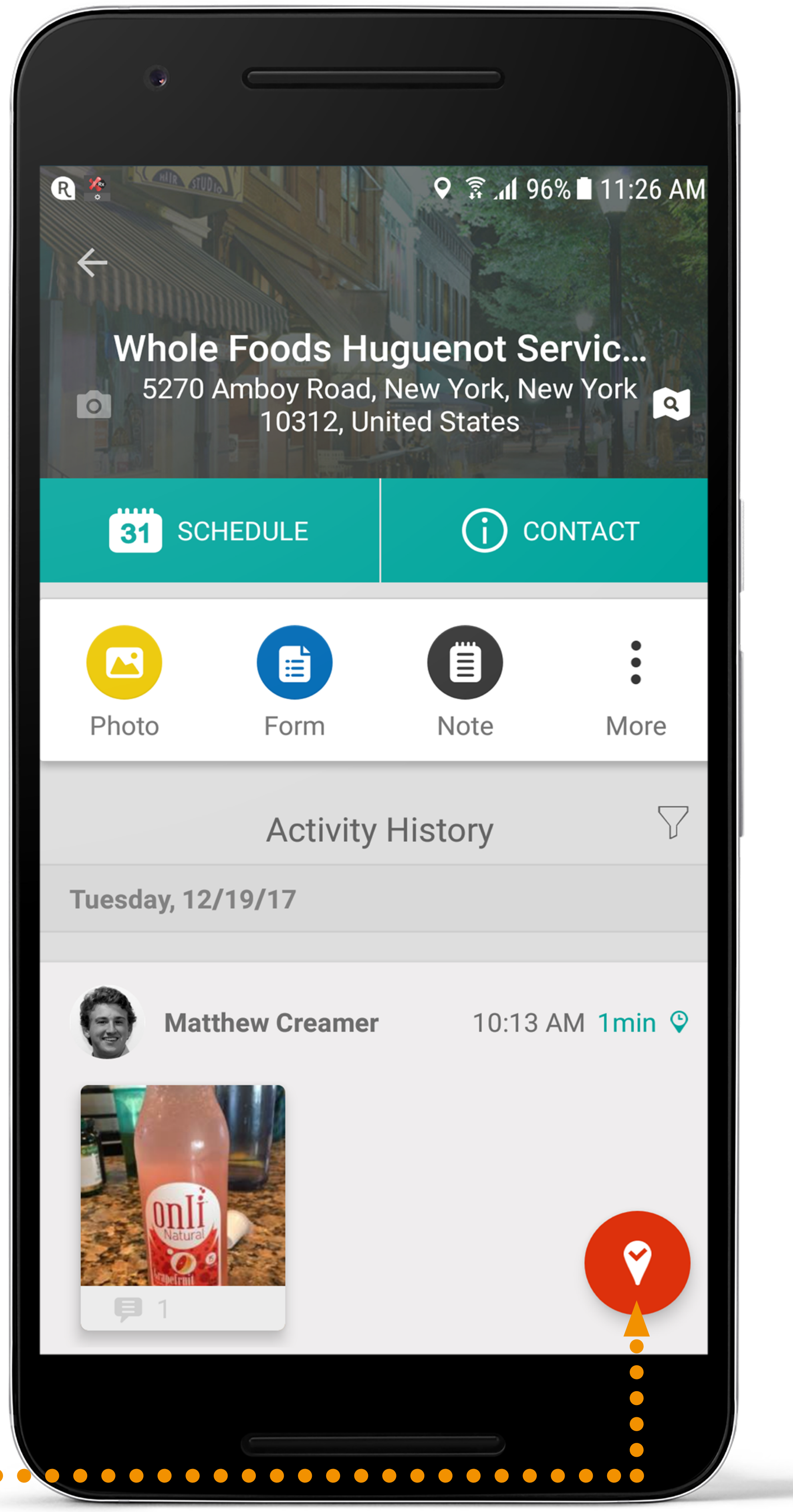
Checking into places allows reps and Managers to track their time at each visit.

By checking in, reps can manage their activities at each location. Each activity completed will be logged in real time in the Backoffice for Managers to view.

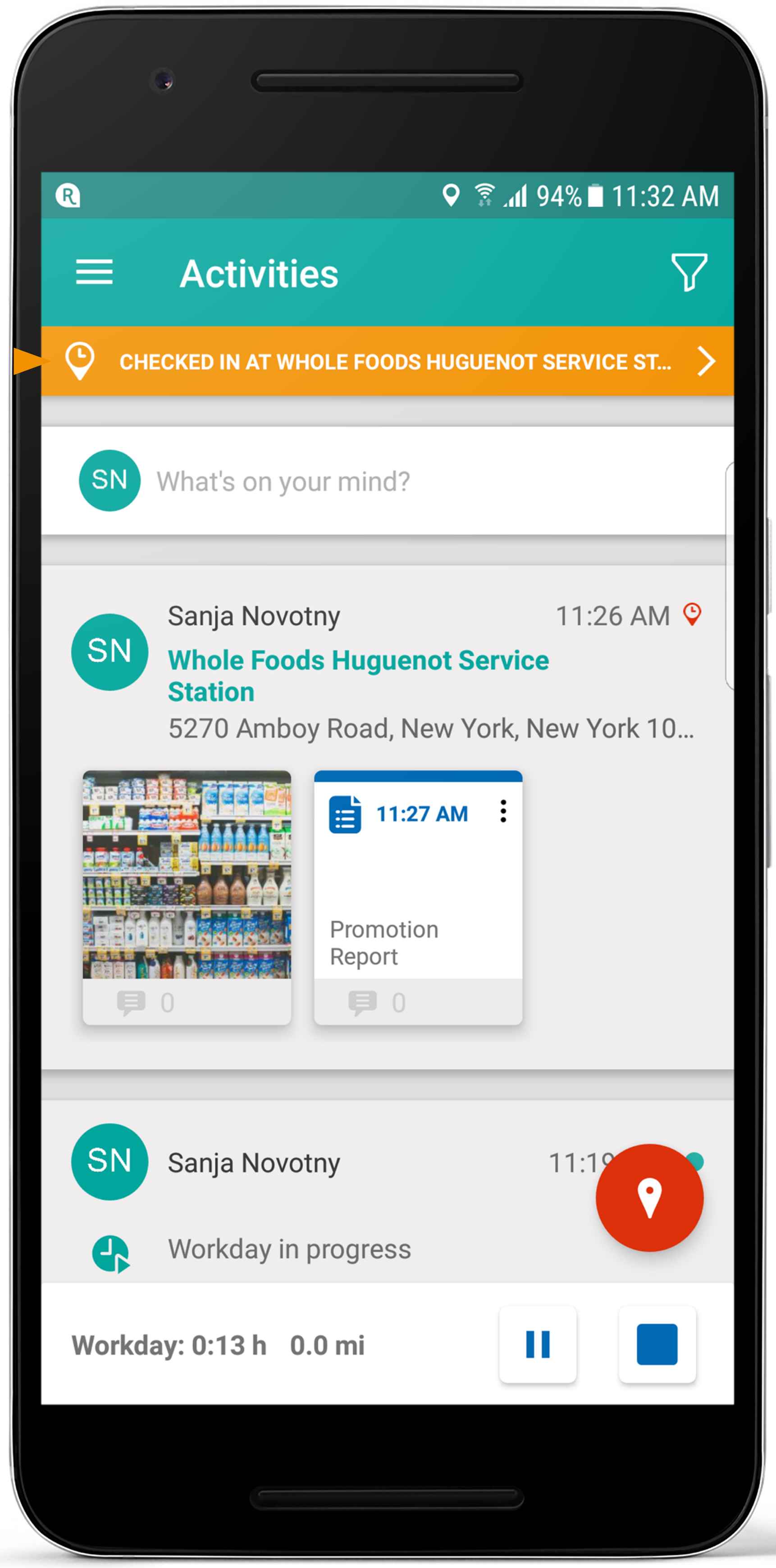
1 Open the **My Places** tab.

2 Select the **place** you want to visit from the **Places list**.

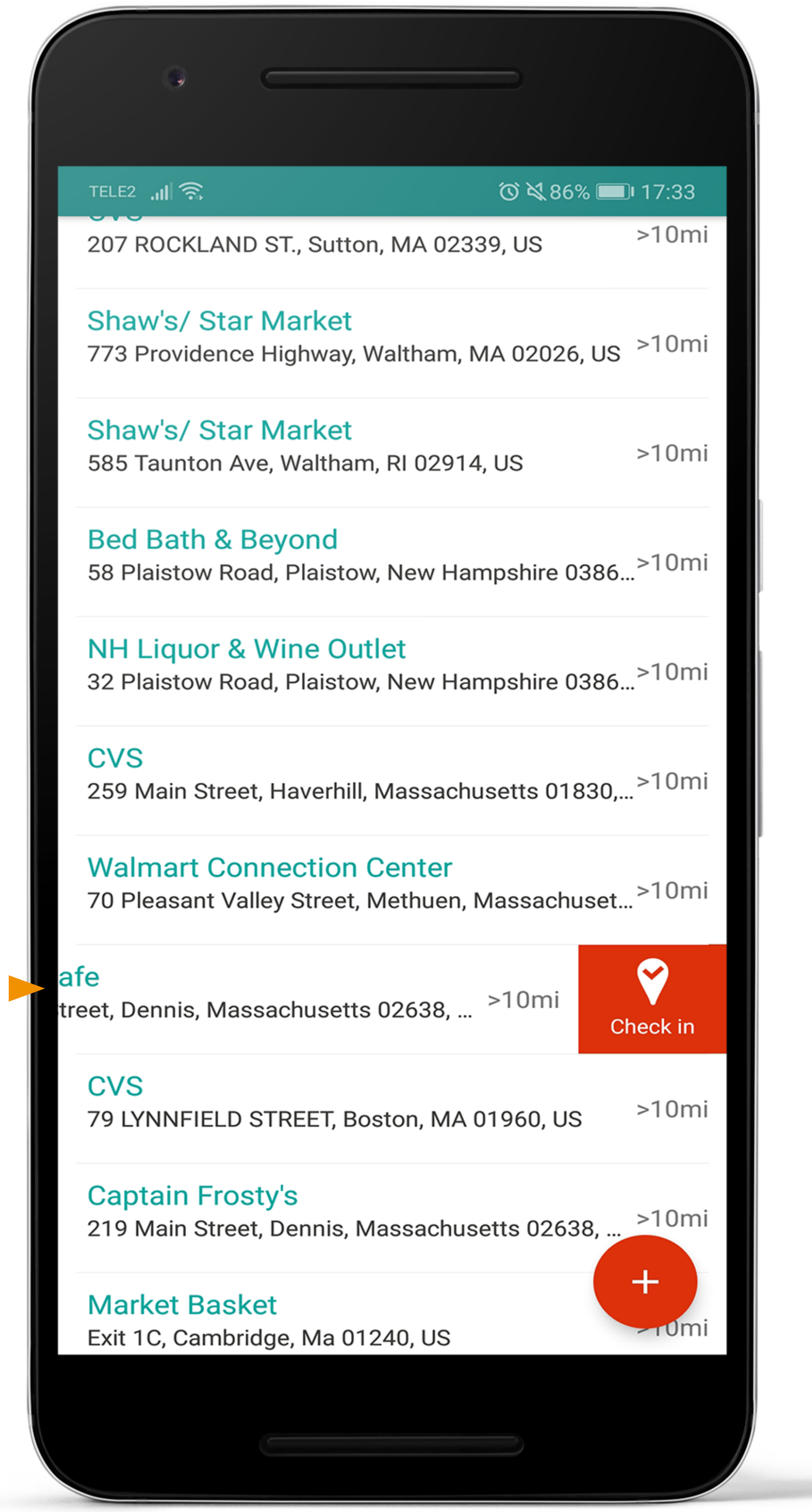




3 Click on the red **Check In Icon**. You are now checked in. Use the buttons on the screen to complete various activities.



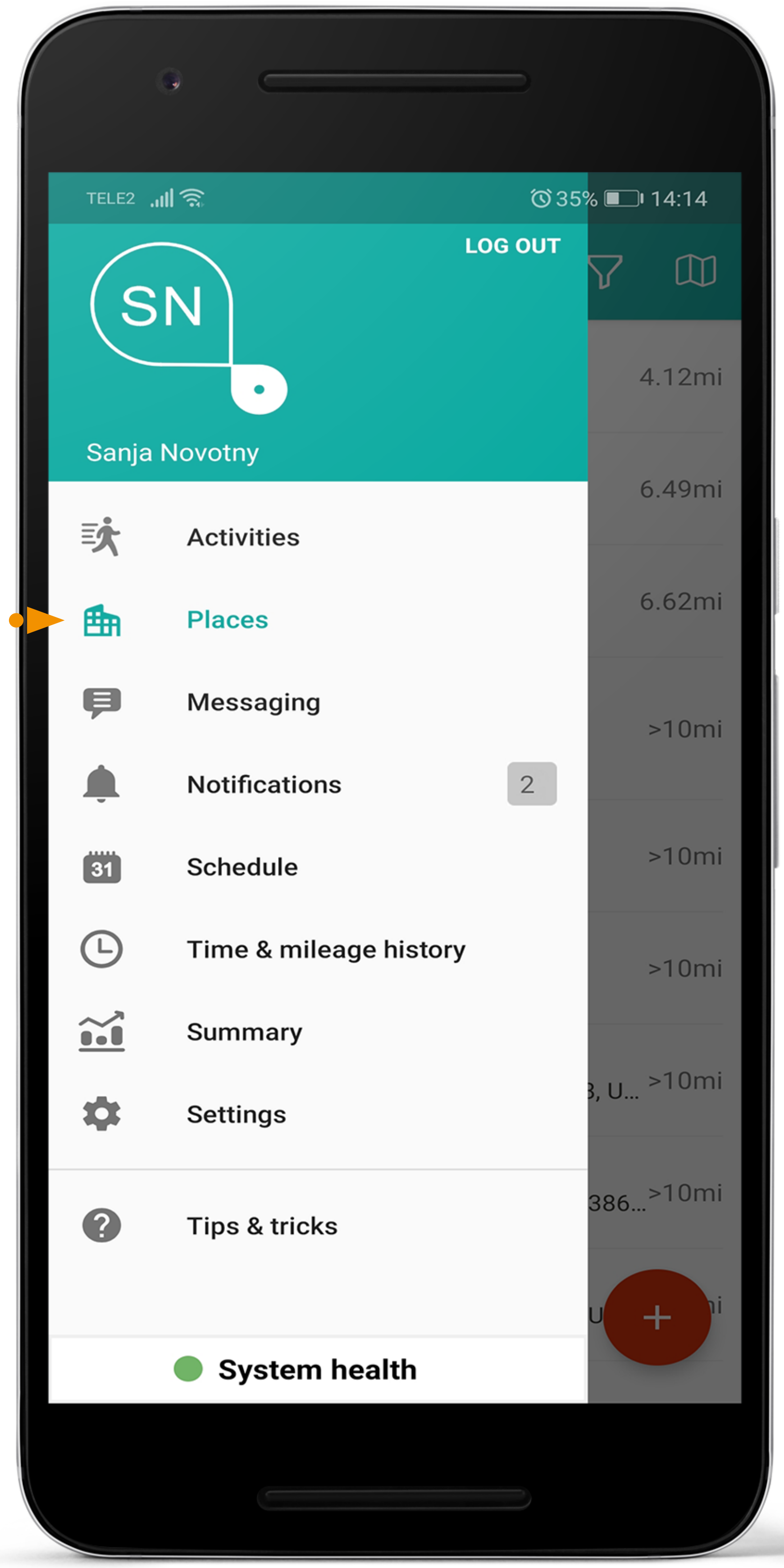
4 If you don't check out from a store, you will receive a reminder that you're still checked in to a previous store.

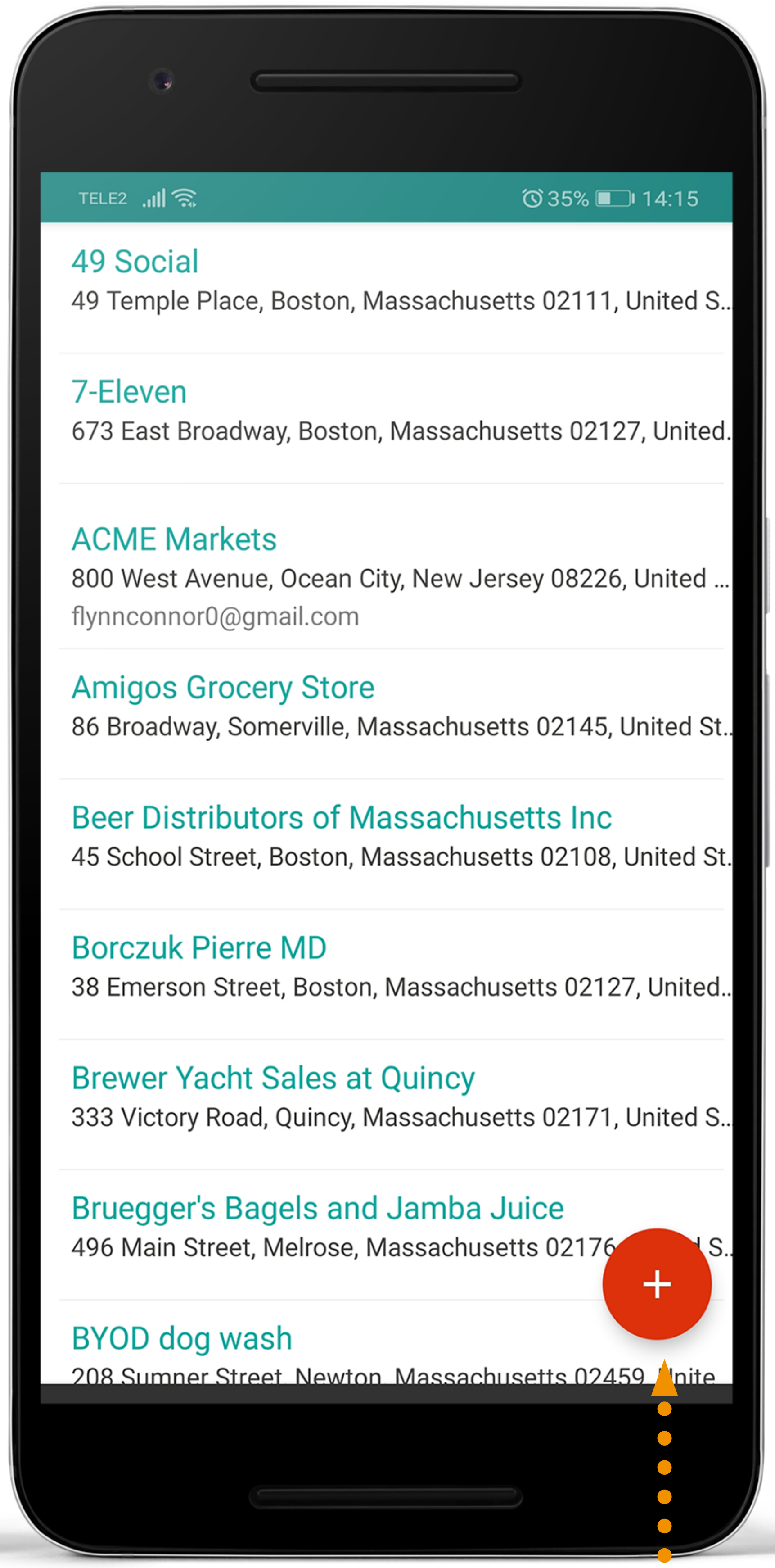


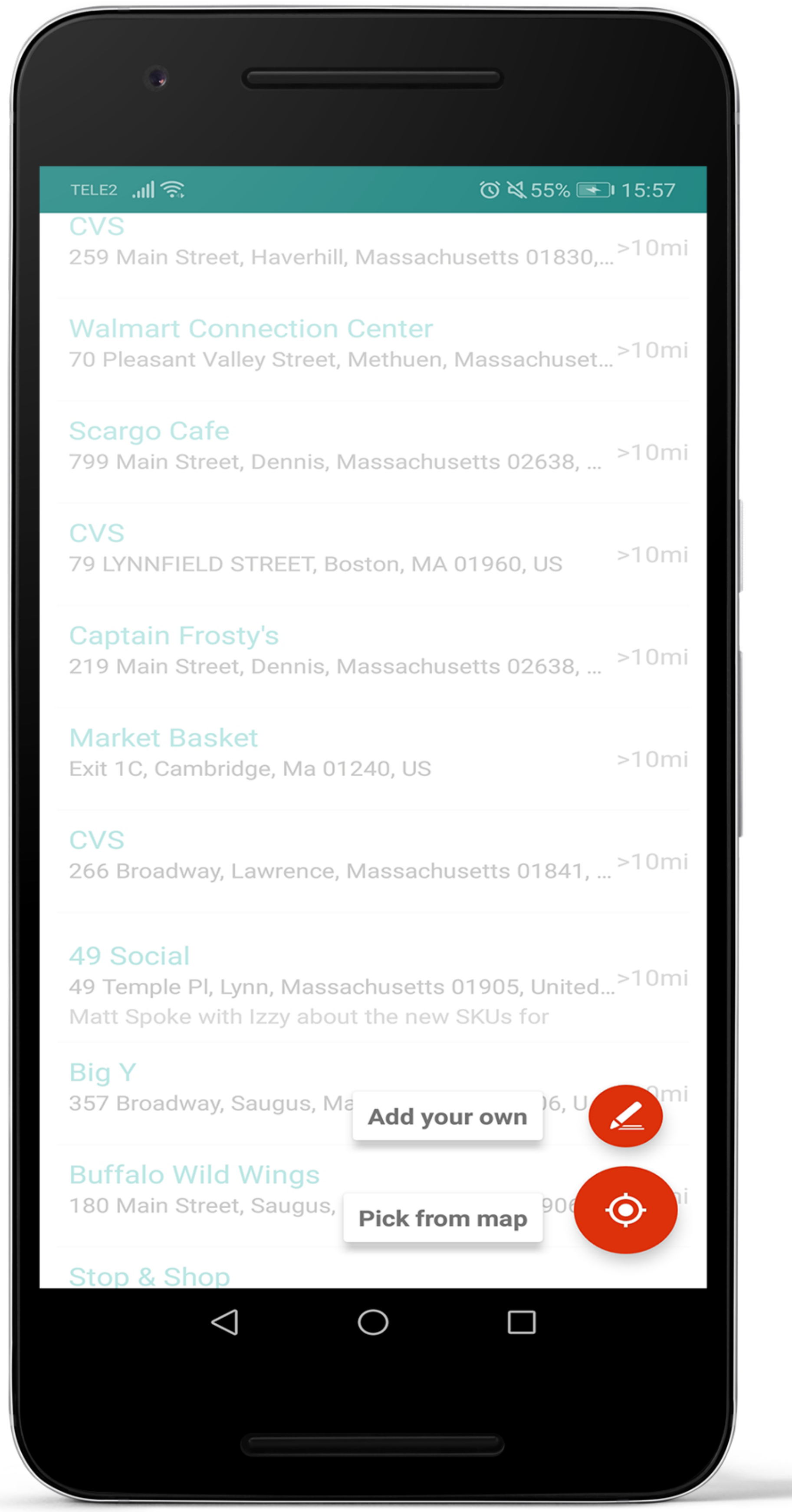
5 Select the place you want to visit from the Places list. You can check-in to a place straight from the Places list using the Quick check-in feature via a swipe gesture.

HOW TO ADD A PLACE?

Being able to enter a new place from the field can create new leads for a company. Repsly allows reps to create new places from the field.

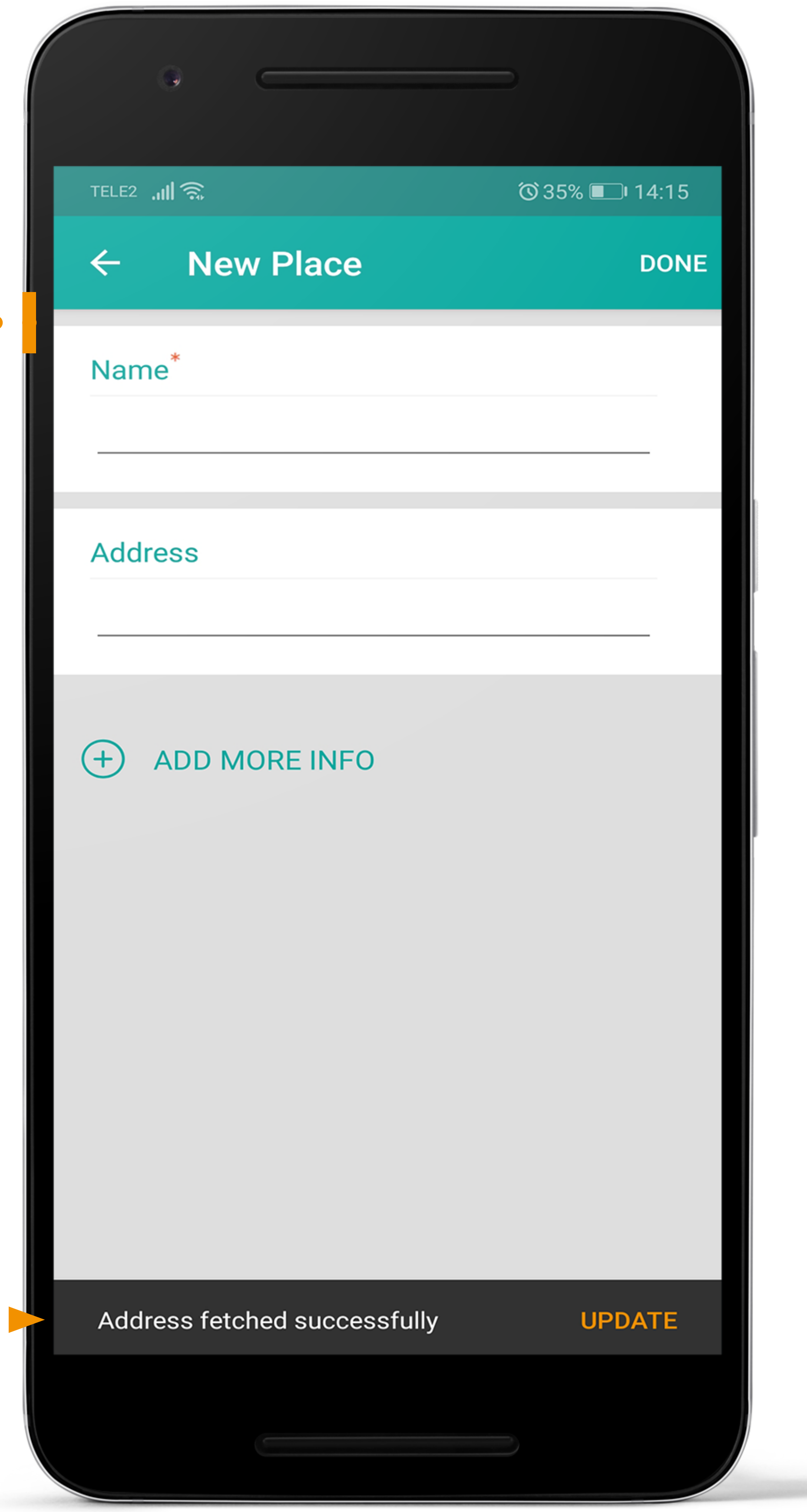


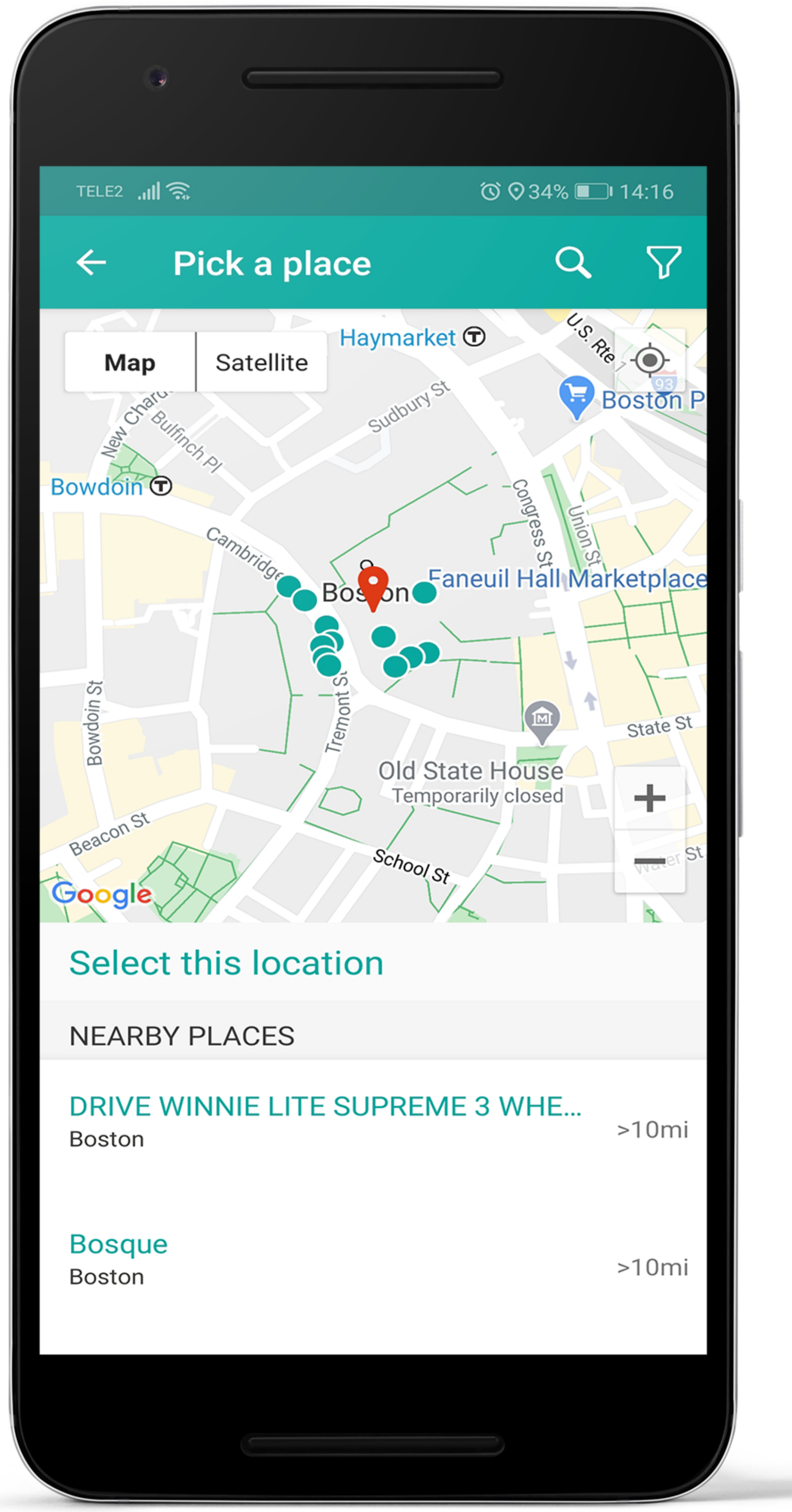


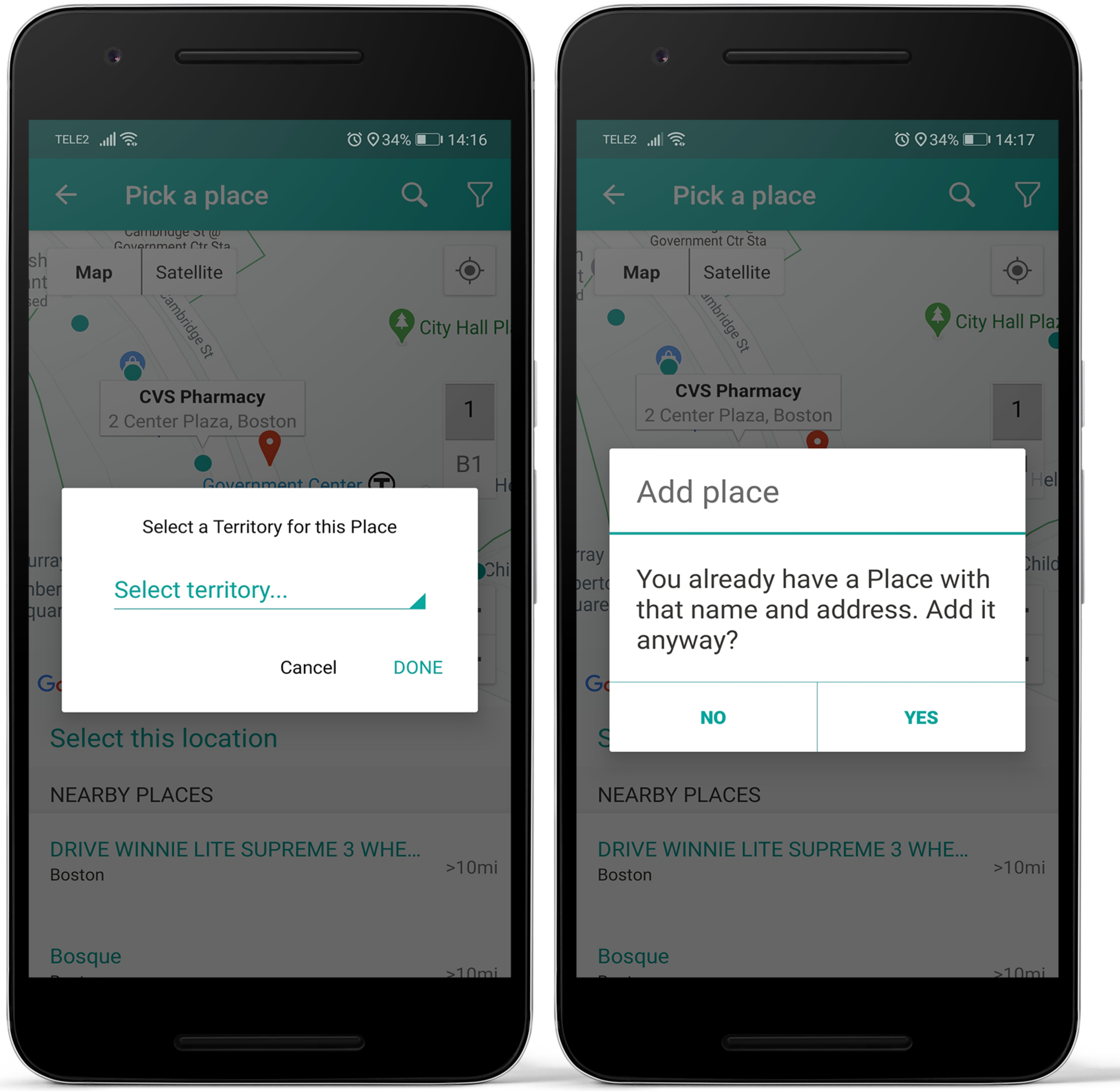


1 Click the My Places tab and then click on the Red + button.

2 After you click the red button you will be taken to another screen and depending on your subscription you can either choose from ***Add your own*** and ***Pick from Map***.







3 If you choose ***Add your own*** you will see a new place profile open. Enter the **Place's contact info**. After your done, click on the **Done button**.

Note: *If your GPS is turned on in the address field your current location will automatically populate.*

4 If you have the option to ***Pick from the map***, your screen will now display your exact location *(red pin)* and the location of prospective leads in your area *(green dots)*.To add a place from this list, simply click on the place's name to add this place to your place's list.

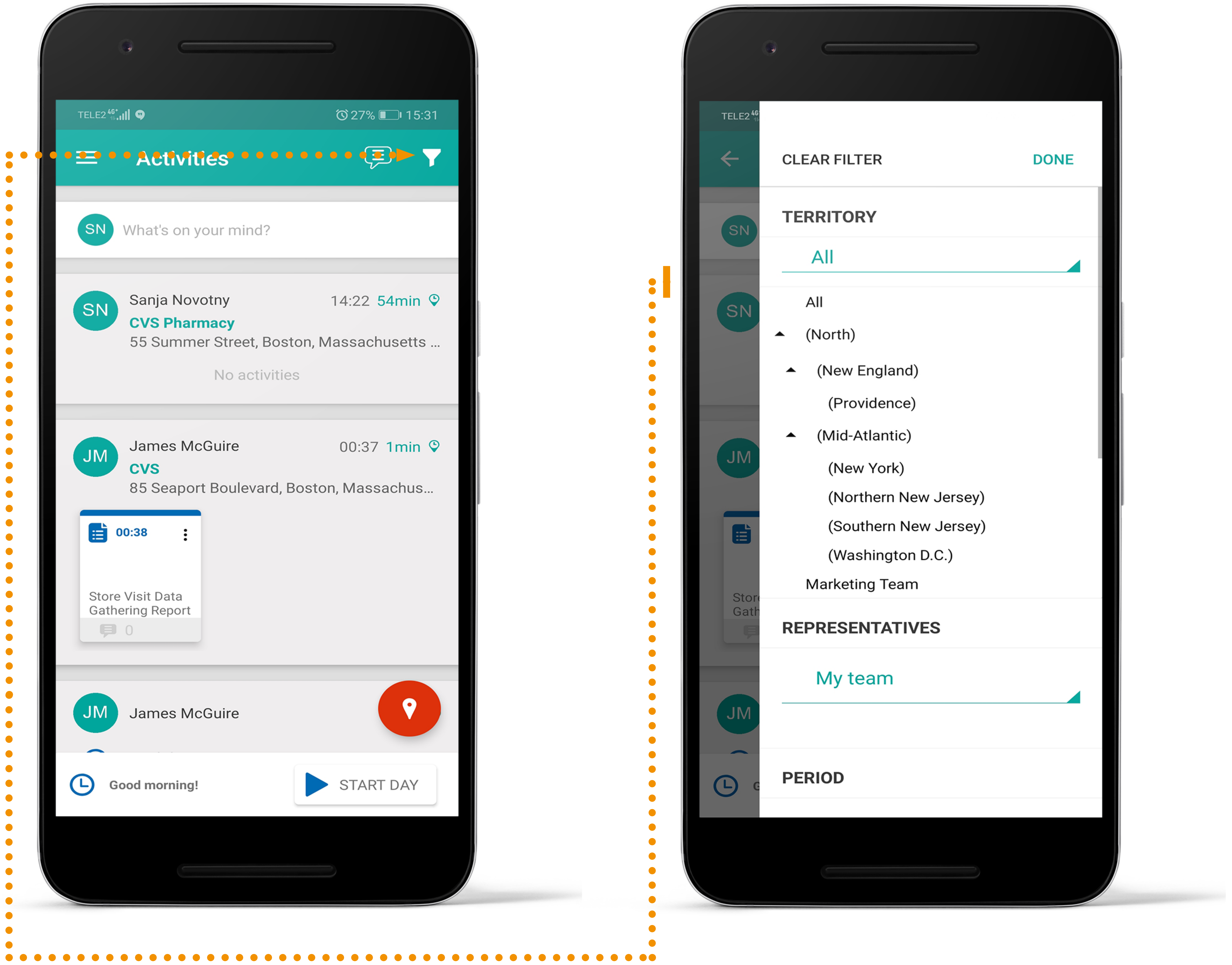
5 If a representative is assigned to multiple territories, a representative has to **select a territory** in which a new place will be assigned. After creating a new place from the field, the place will be listed on the list of the places in the Backoffice.

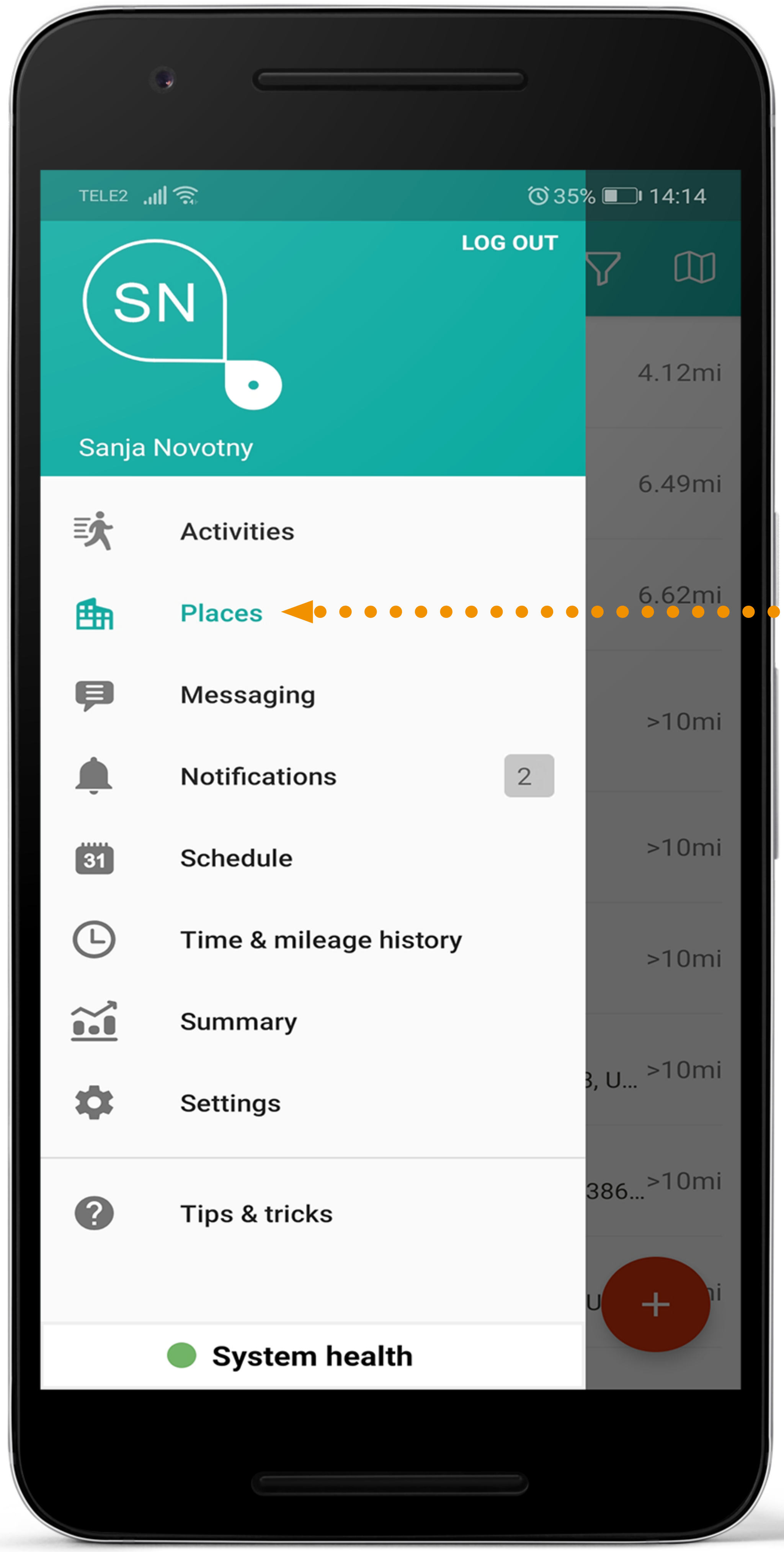
HOW TO SWITCH TERRITORIES?

If a representative is assigned to multiple territories, the representative can now switch between their assigned territories. This filter will be applied to the Activities feed and My Places.

To switch the territory, click on the **filter** and a drop-down menu with all available **Territories** to choose from will appear.

1



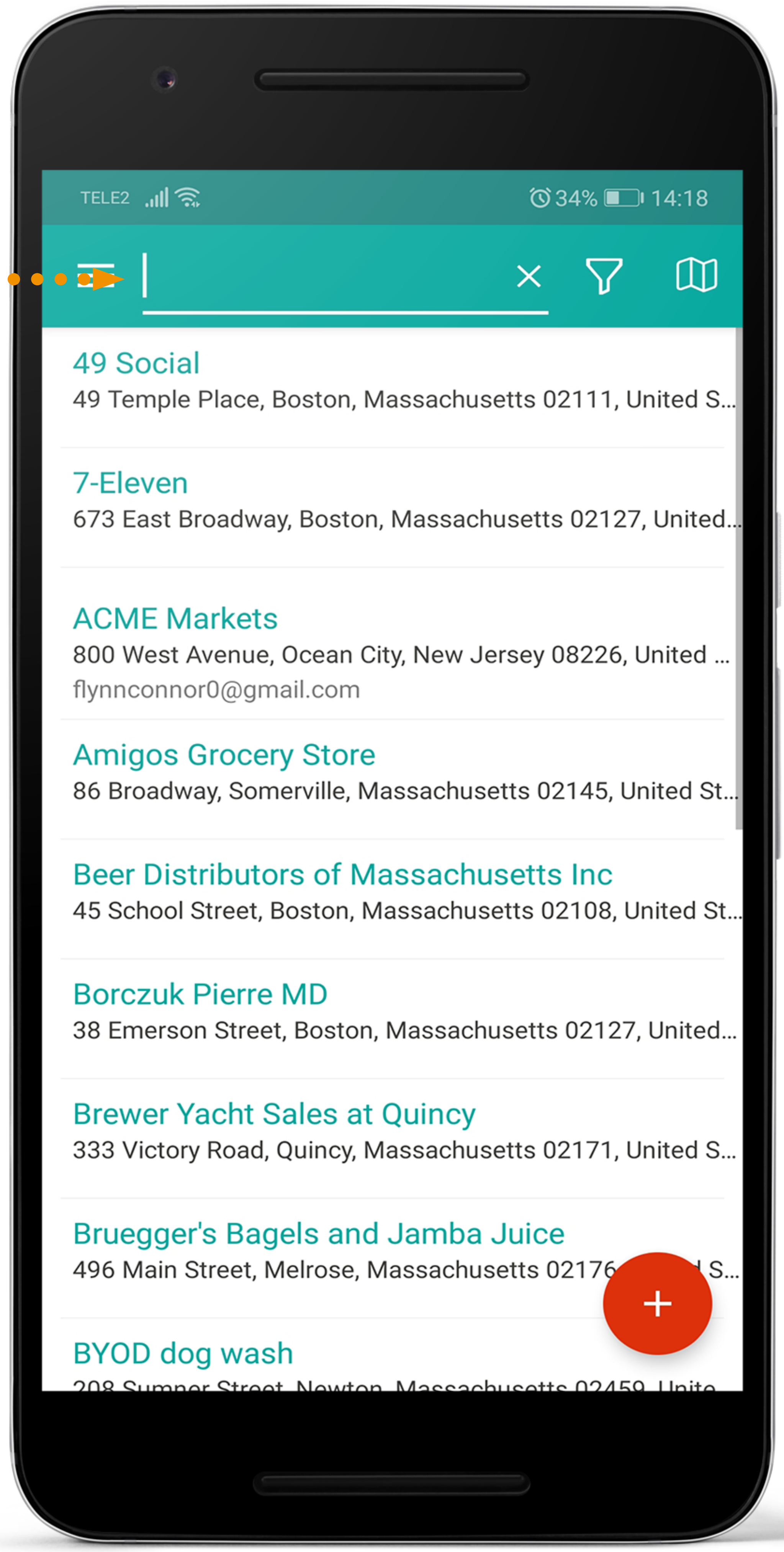


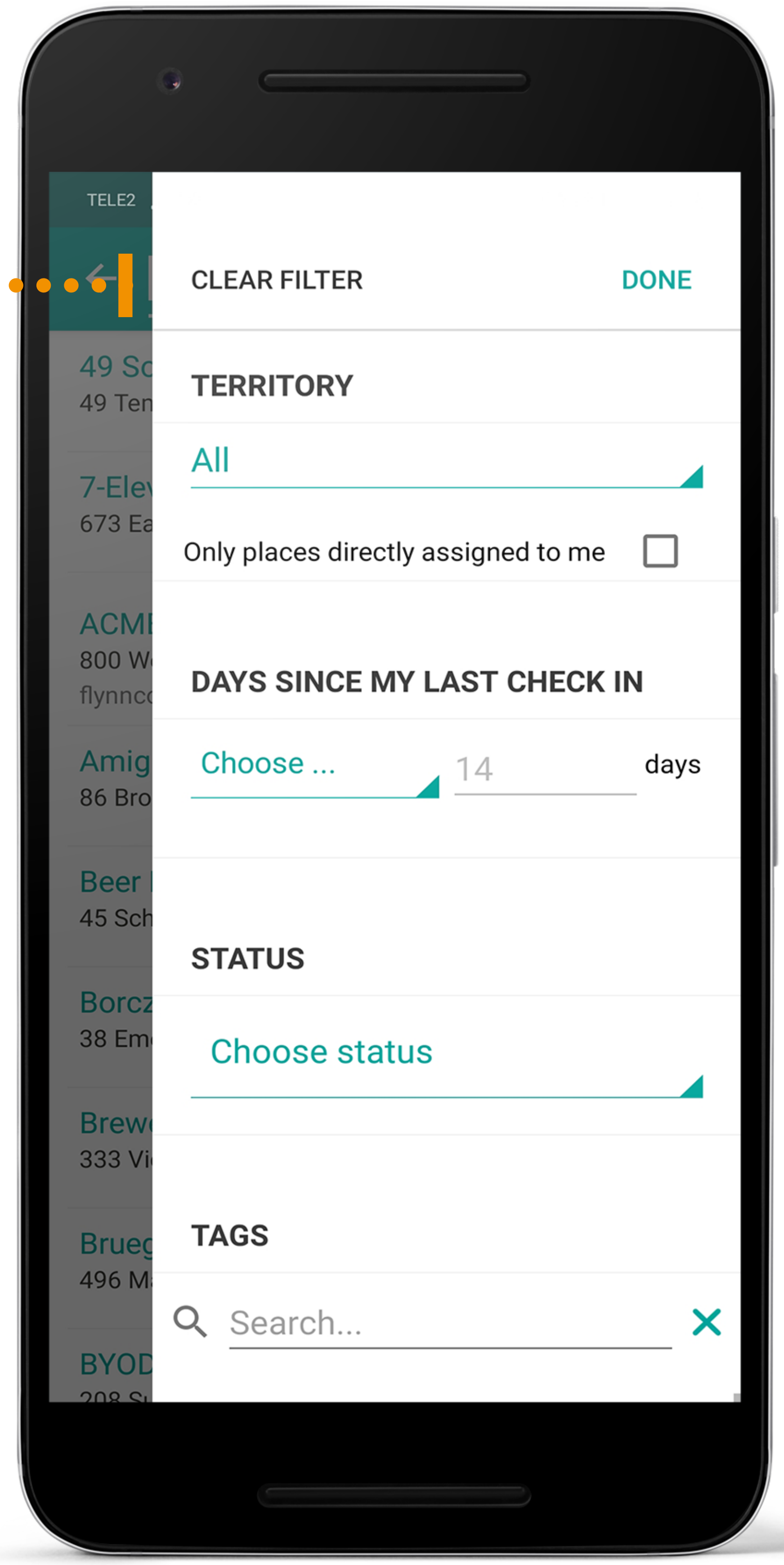
HOW TO FILTER PLACE LIST?

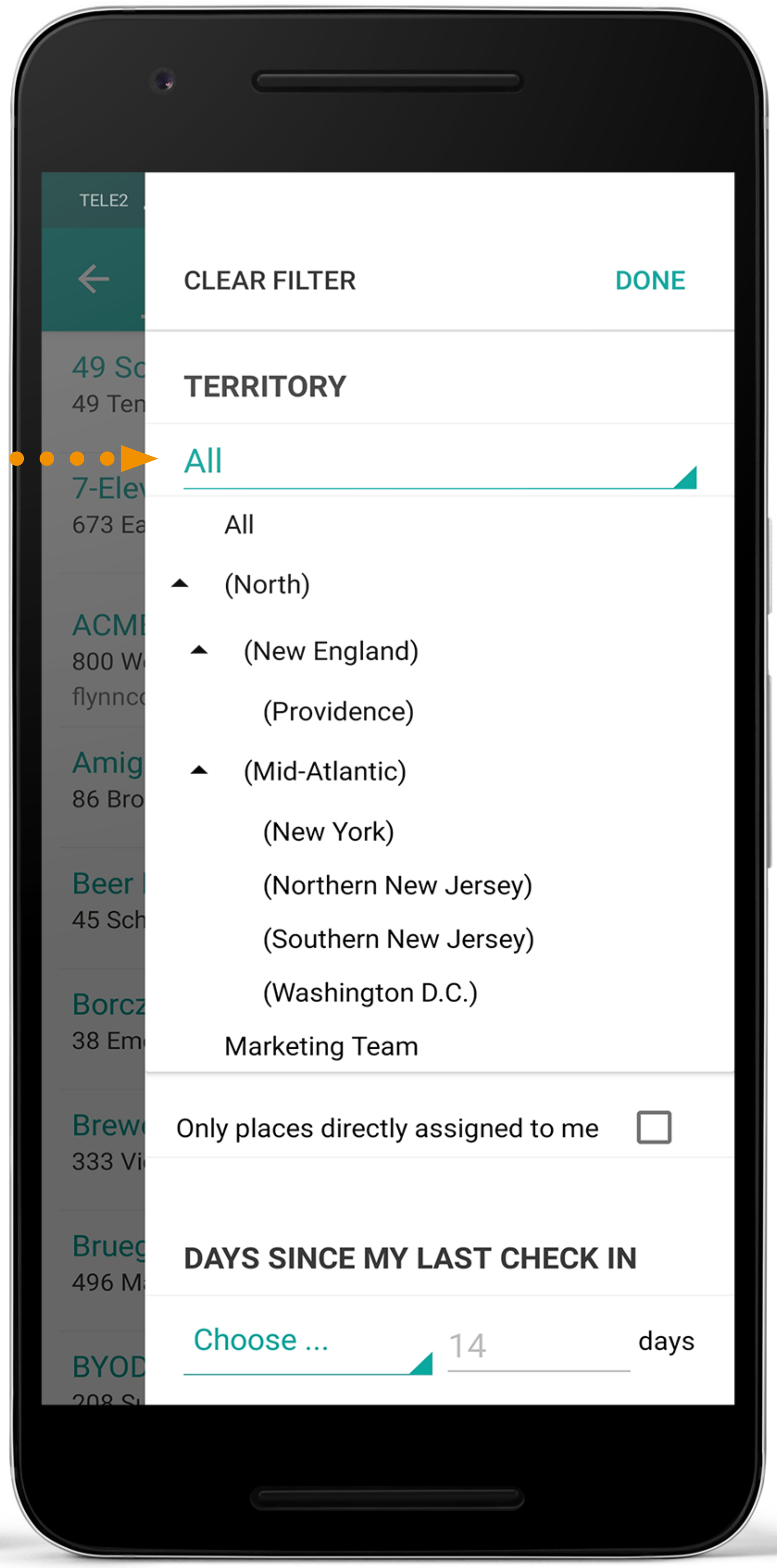
Representatives can search for places using any identifying criteria, and Repsly will immediately filter the list, simplifying the place search process.

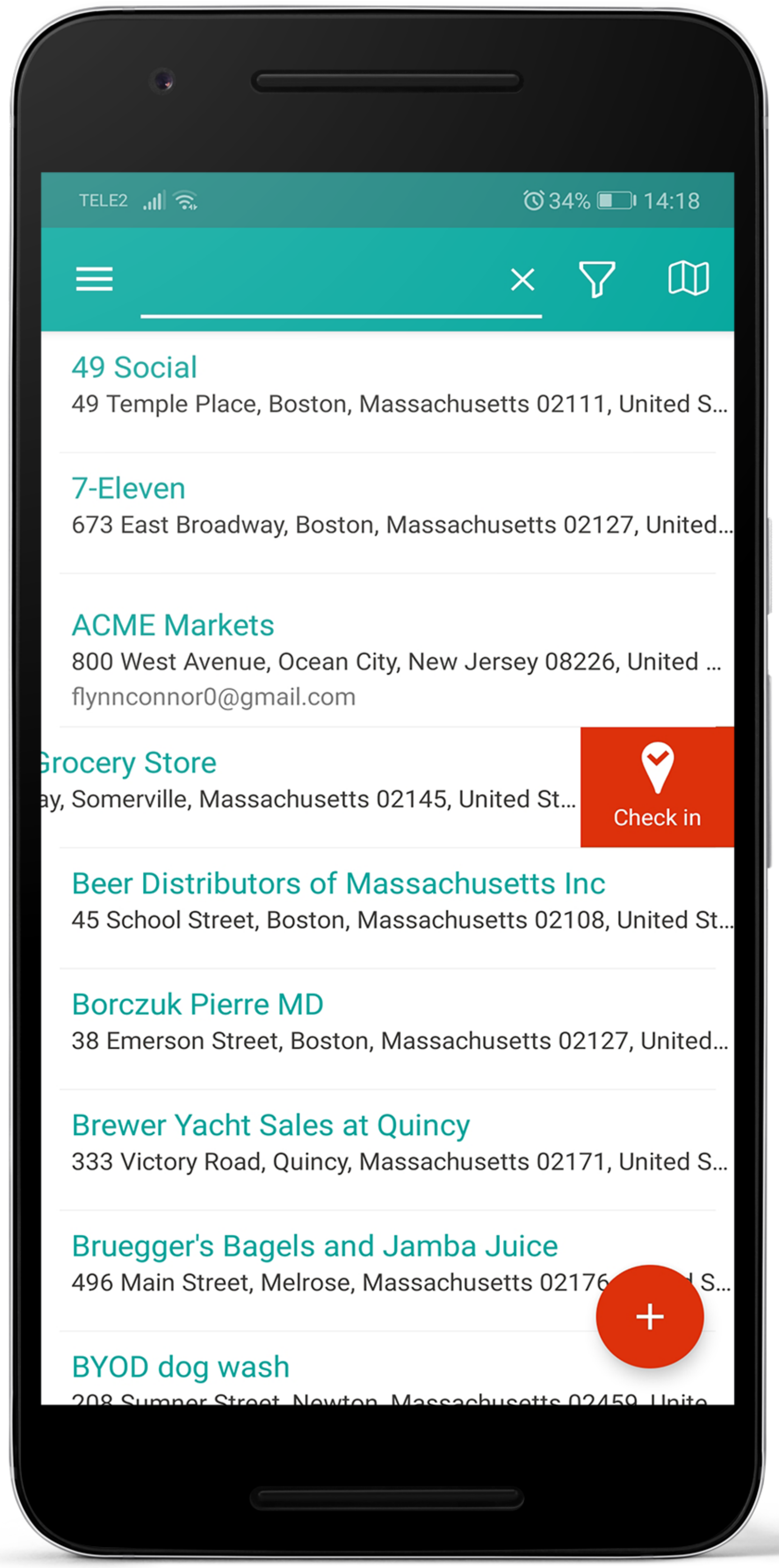
1 Press on the **Places tab**.

2 Type directly into the **search box** and enter your search query. You can search by place name, address info, or their specific place code.





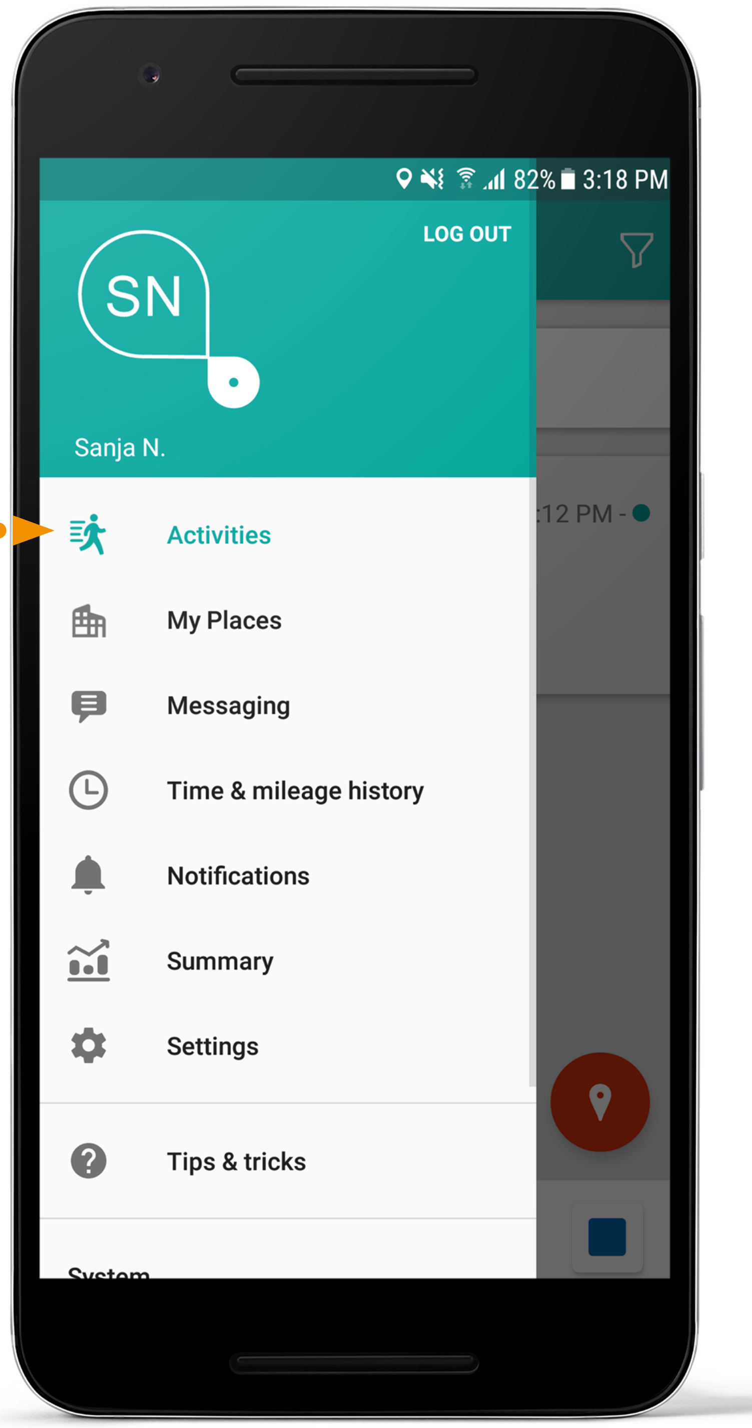


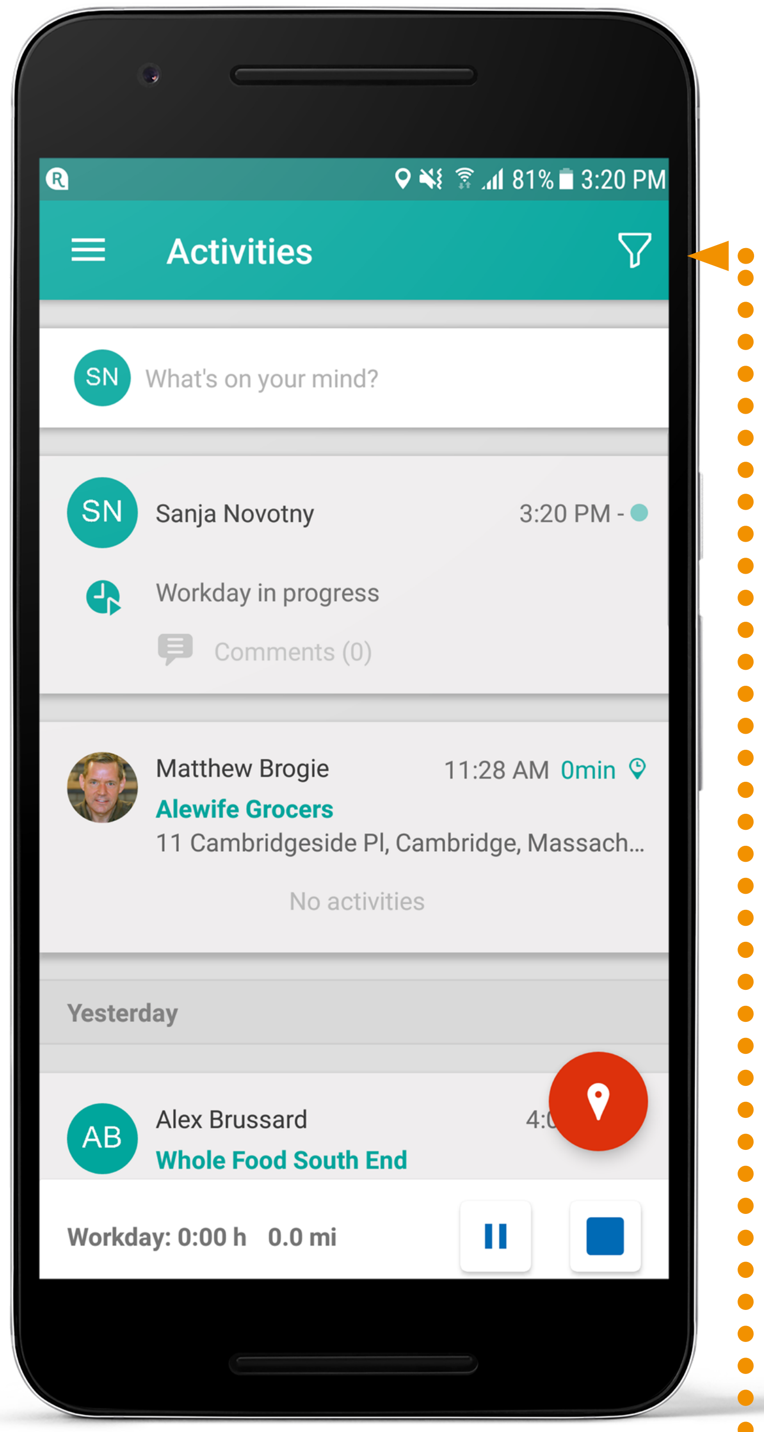


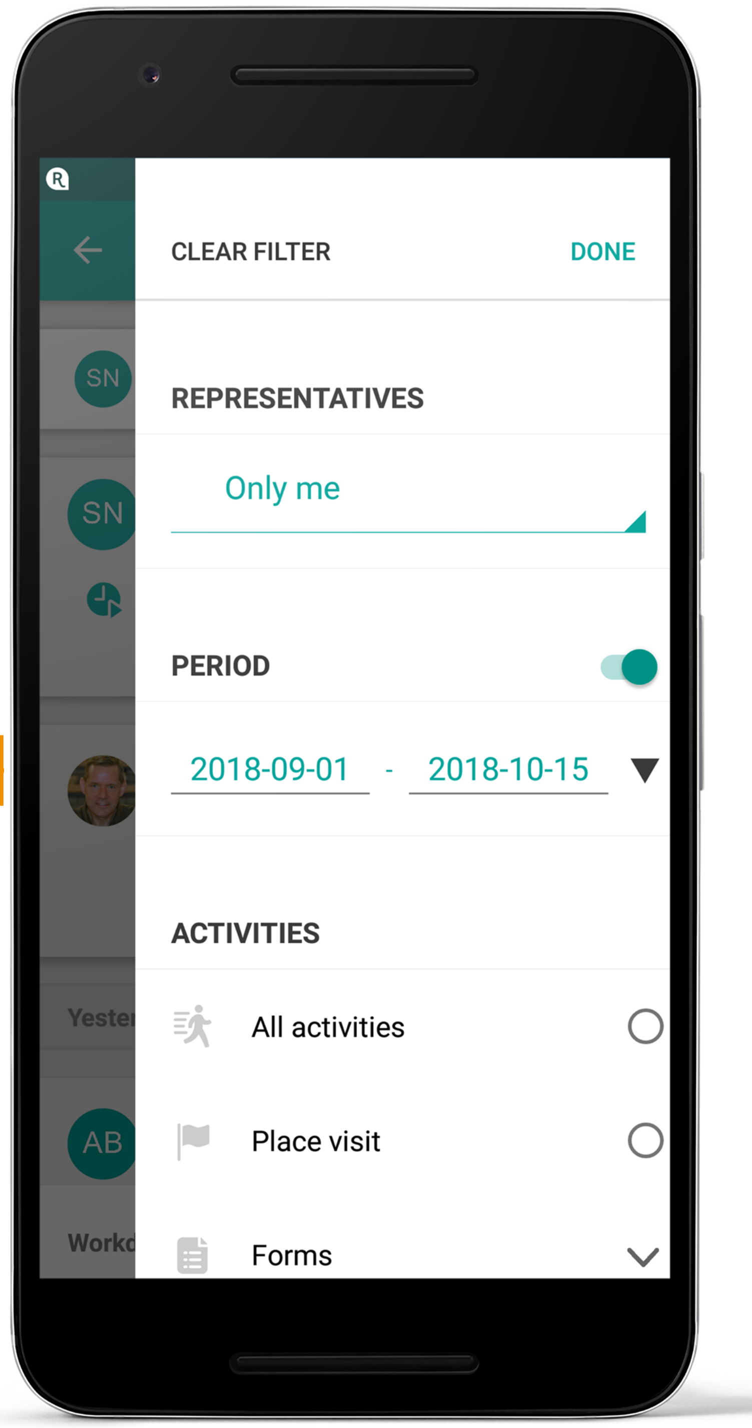
3 If a representative is assigned to multiple territories, the representative can now switch between their assigned territories.
To switch the territory, click on the filter and a drop-down menu with all available Territories to choose from will appear.

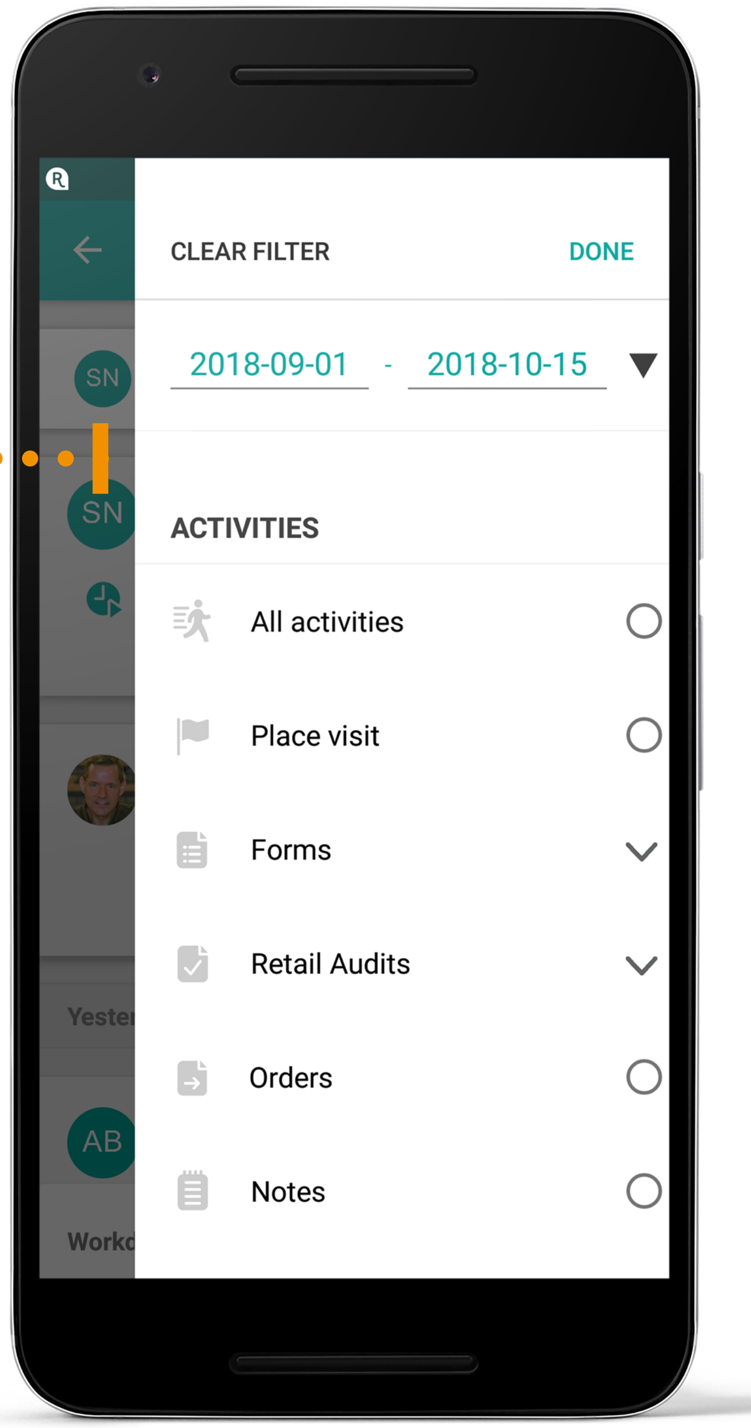
4 Representatives can check-in to a place using the Quick check-in feature from places list via a swipe gesture.

HOW TO FILTER AND VIEW PAST VISITS?







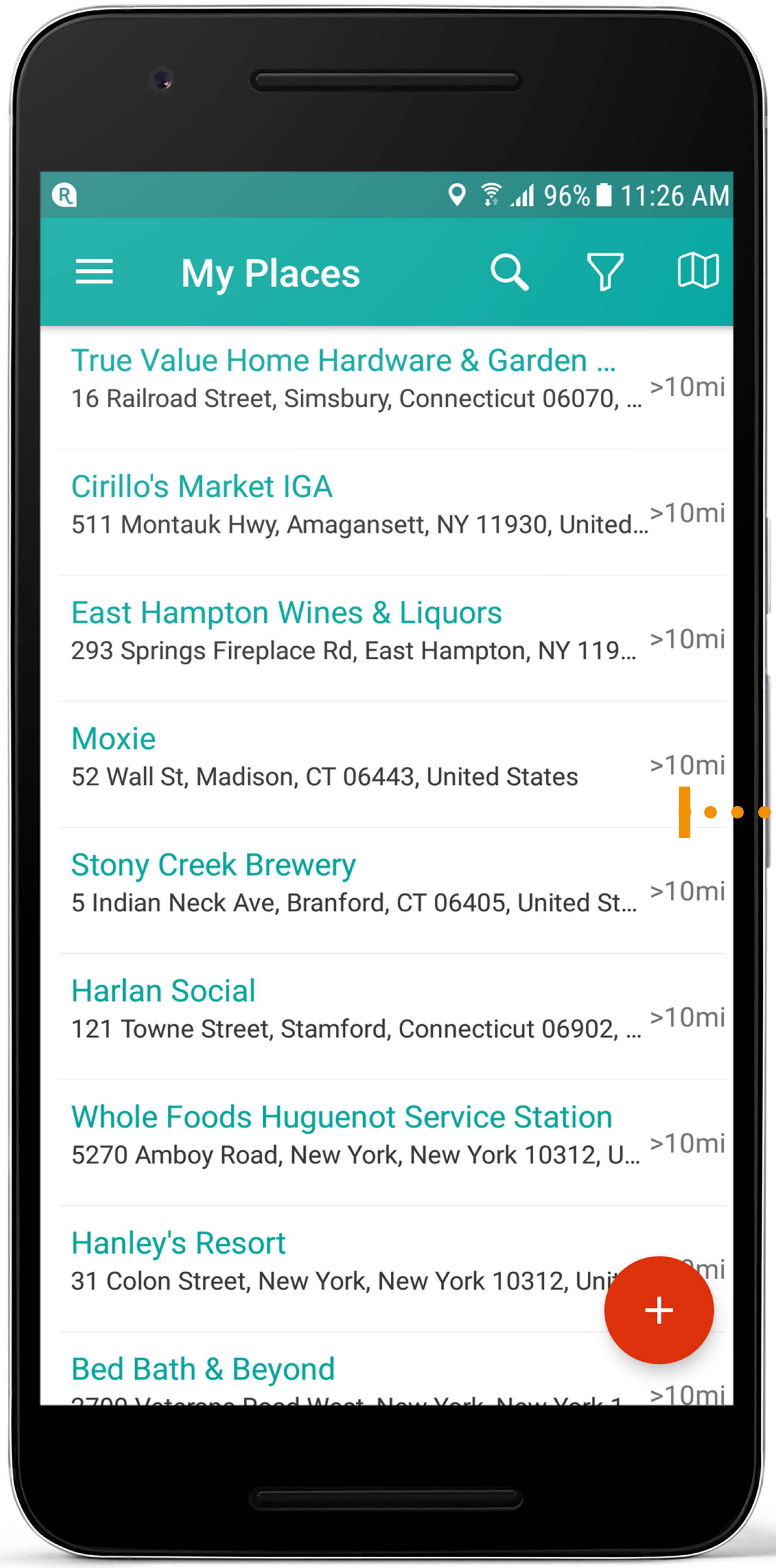


1 Click on the **Activities tab**.

2 Click on the **Filter icon** to select filters to narrow down your data.

3 Select the date(s) for which you want to see your activities history, using the **date filter**. The activities will be listed on the news-feed in chronological order.

4 Additionally, you can narrow down the criteria using **additional filters** (such as place or tags). Click the **Done** button.

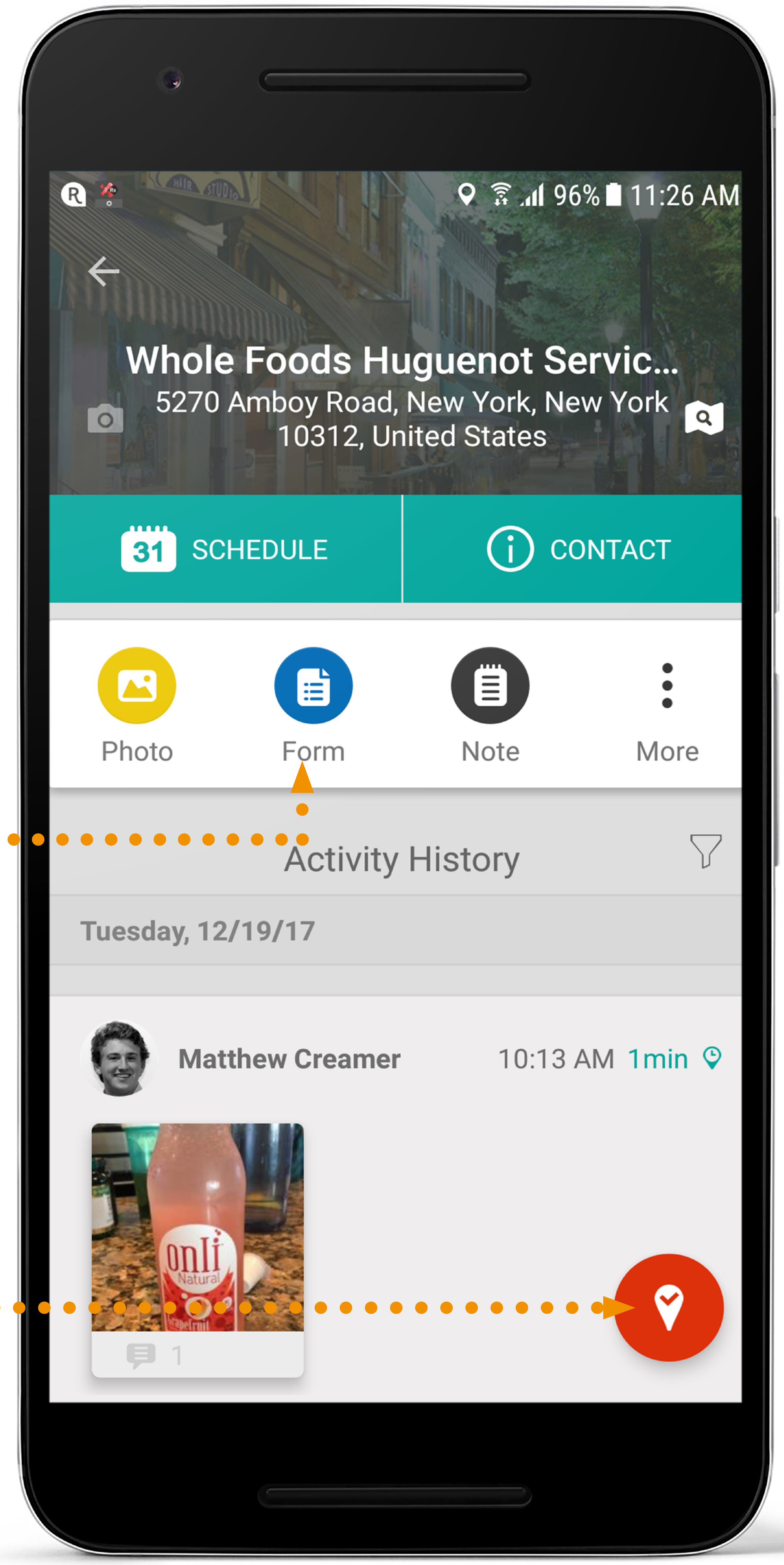


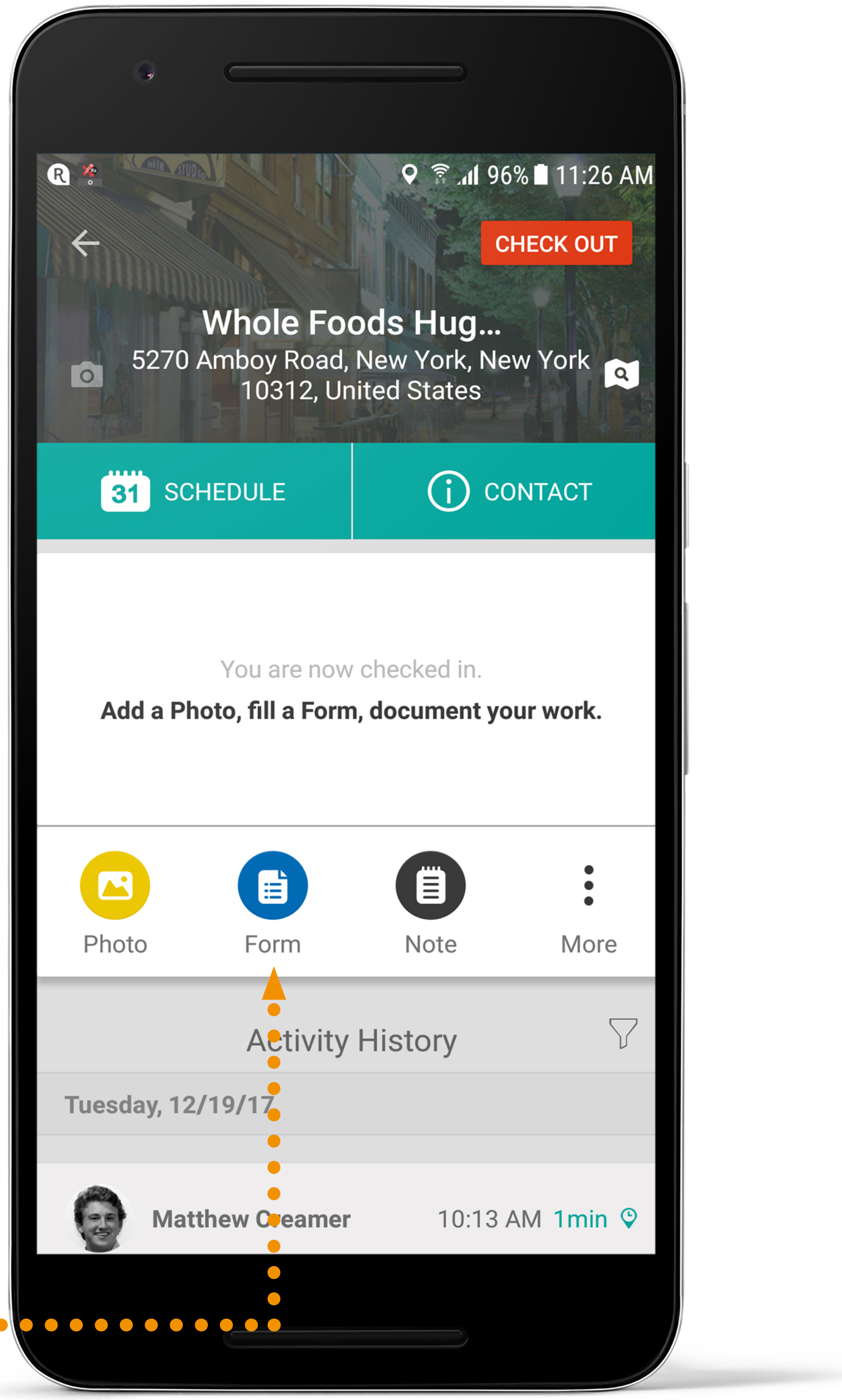
HOW TO FILL OUT A FORM?

Forms are the perfect way for your reps to capture data and store level insights.

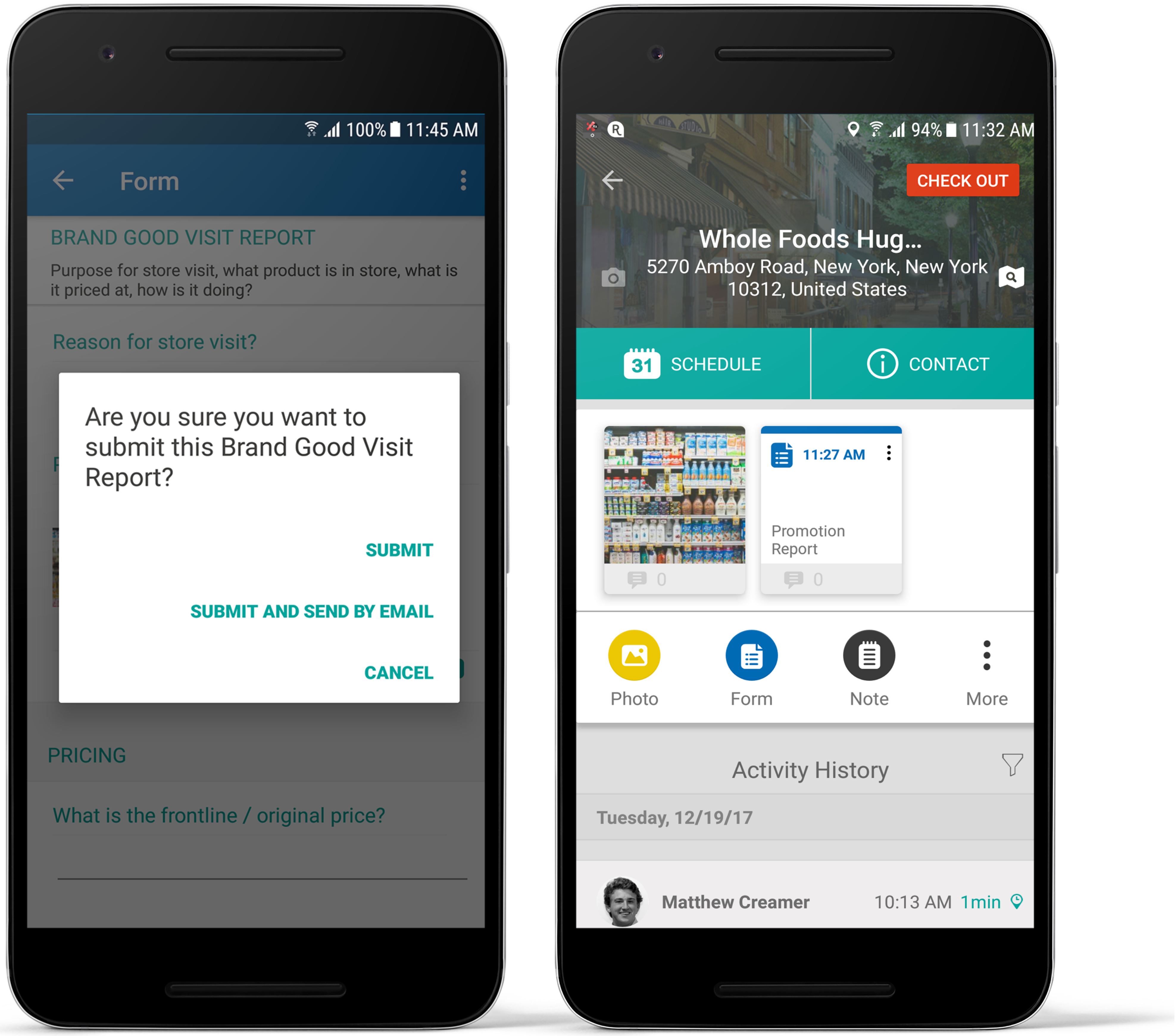
1 Choose the **place** for which you wish to fill out the form from your list of places.

2 Click the **Check-in icon** and select the **Form** option.





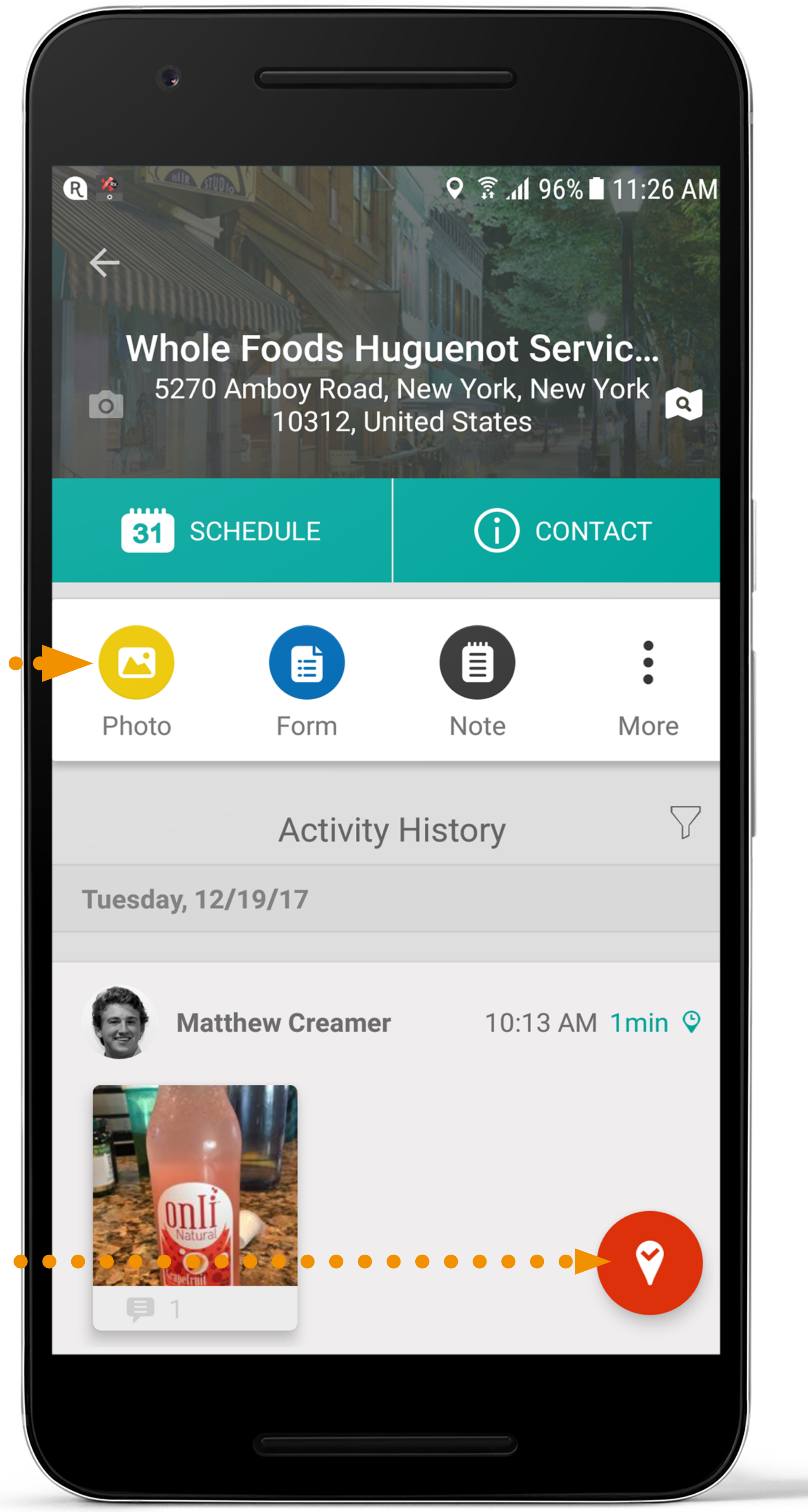
3 Choose the appropriate **form**.

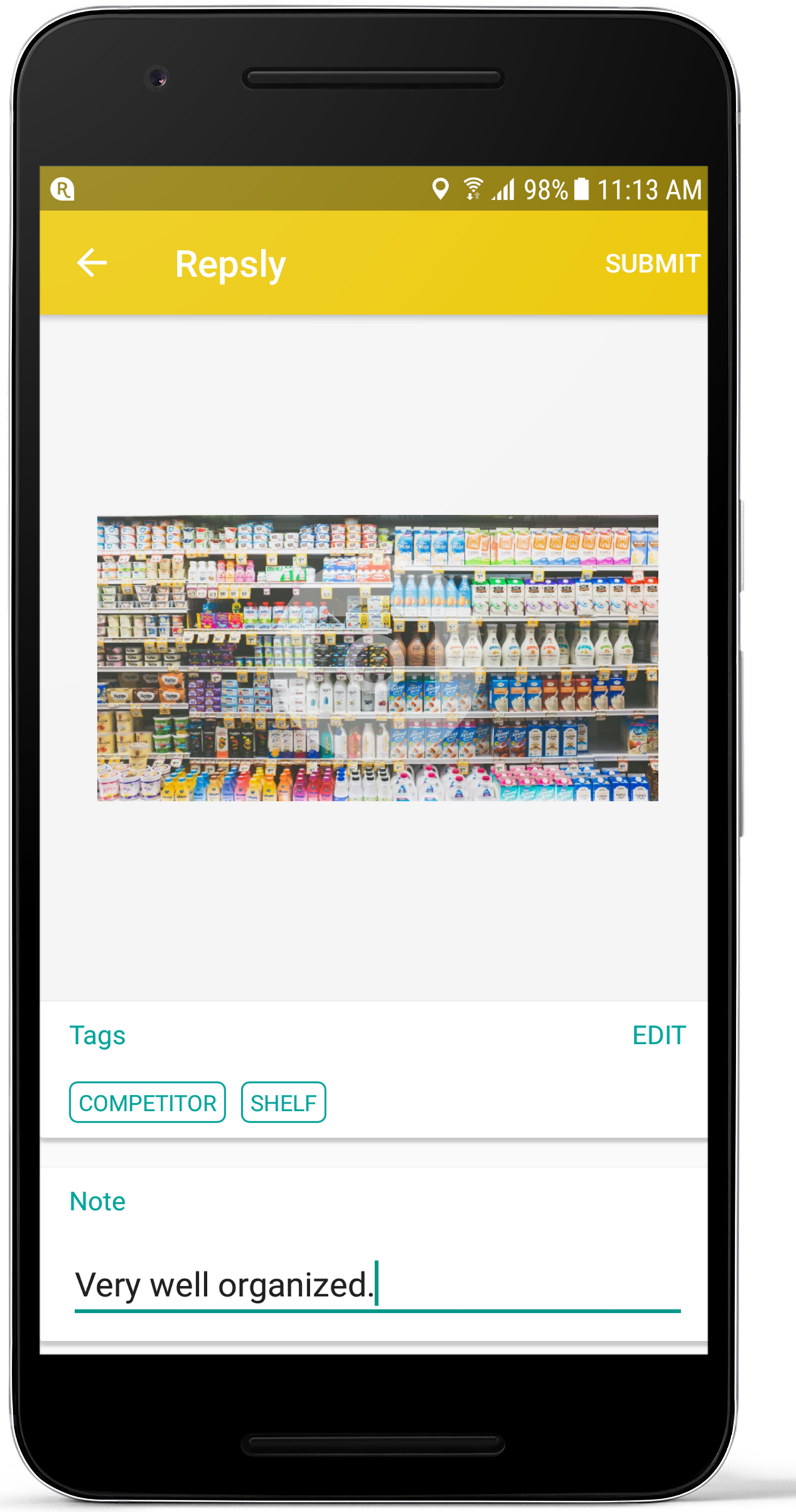


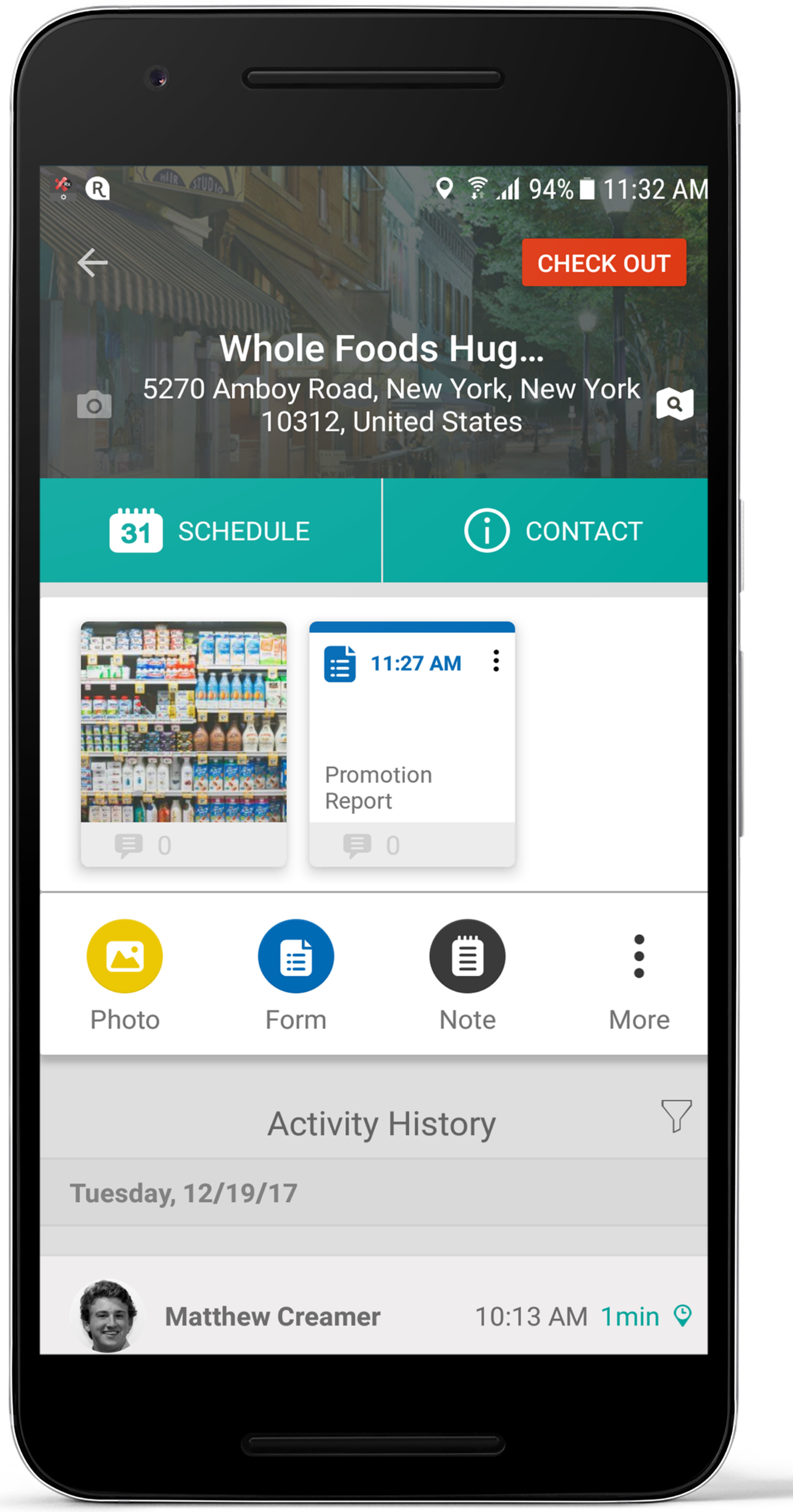
4 Fill out all the necessary fields on the form. Press the **Done** button. If you want to email this form, please click the **Submit** and **Send by Email button**.

HOW TO TAKE A PHOTO?

Capture photos of all your points of interest, tag them and build an excellent photo archive.







1 Check into that place using the **Red Check in Icon** and click on the **Photo option**.

2 You can now choose an upload option. You can either **take a photo** with your mobile device's camera or **upload a photo** from your mobile device's library.

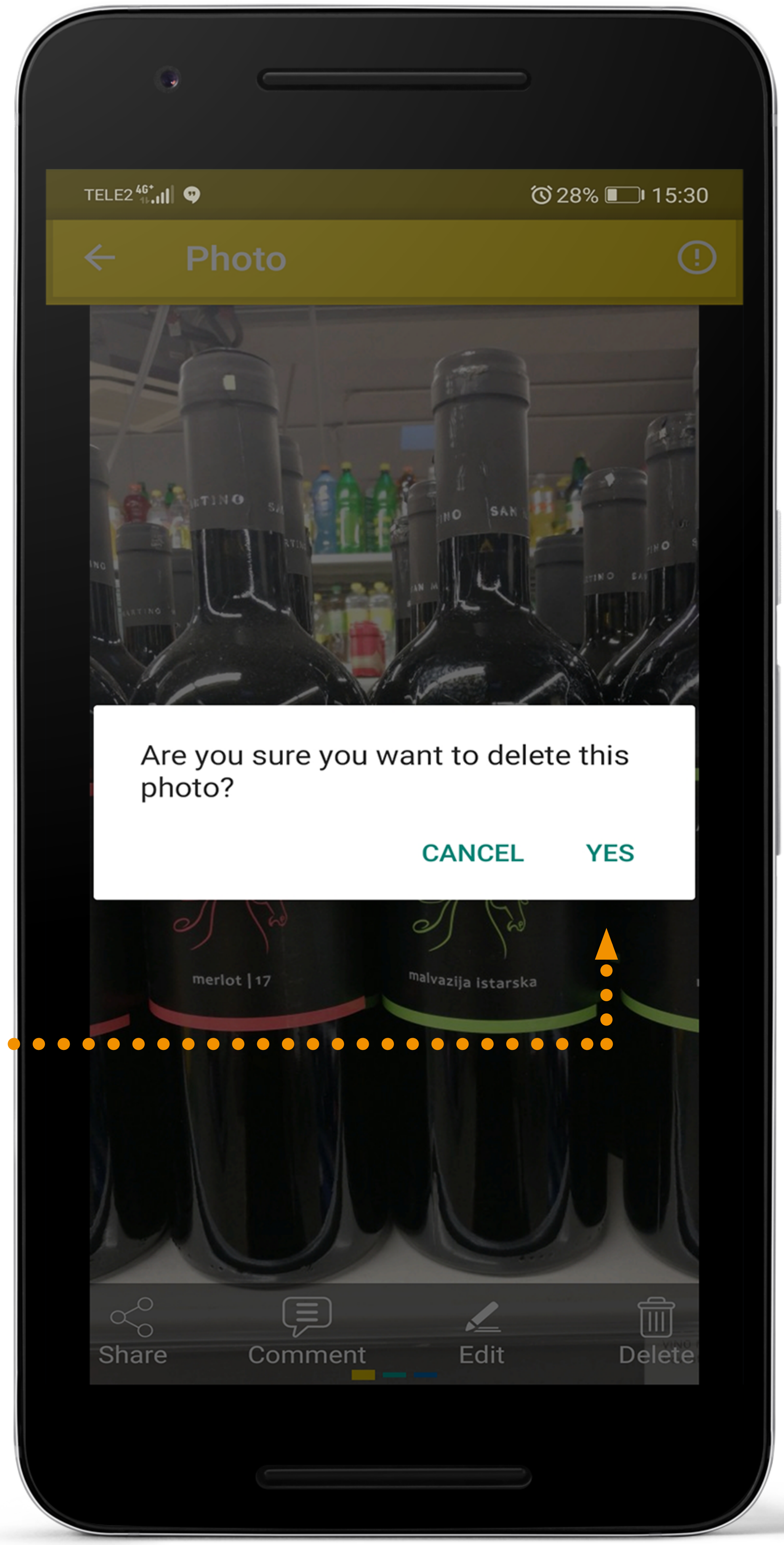
3 When done, press the **Done** button to submit the photos to the Repsly Backoffice app.

HOW TO DELETE A PHOTO?

If a representative has accidentally taken a photo that should not be in the Repsly app, they can easily delete themselves.

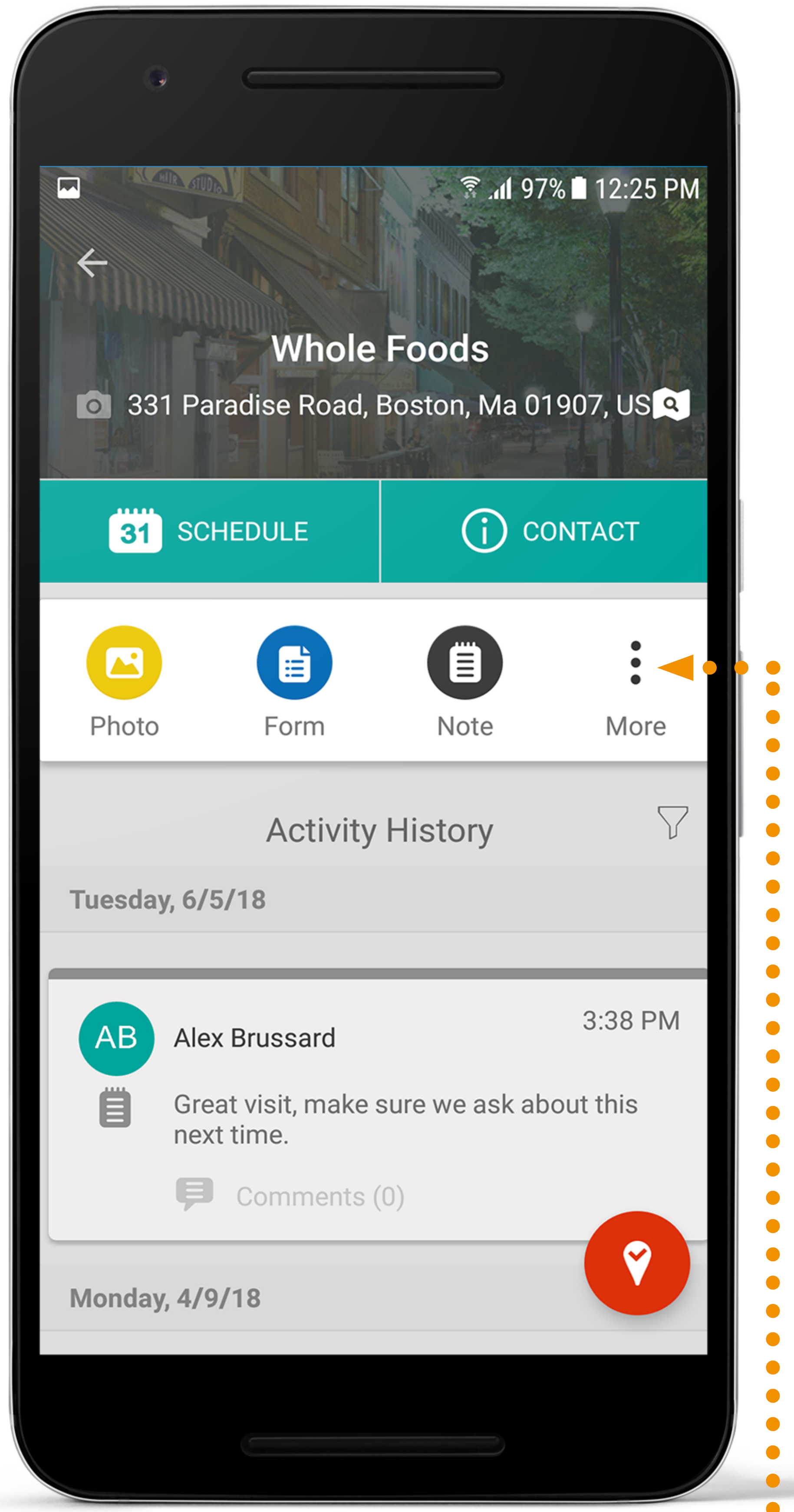
1. Open the photo you want to delete and click on the **delete button** in the bottom right corner.

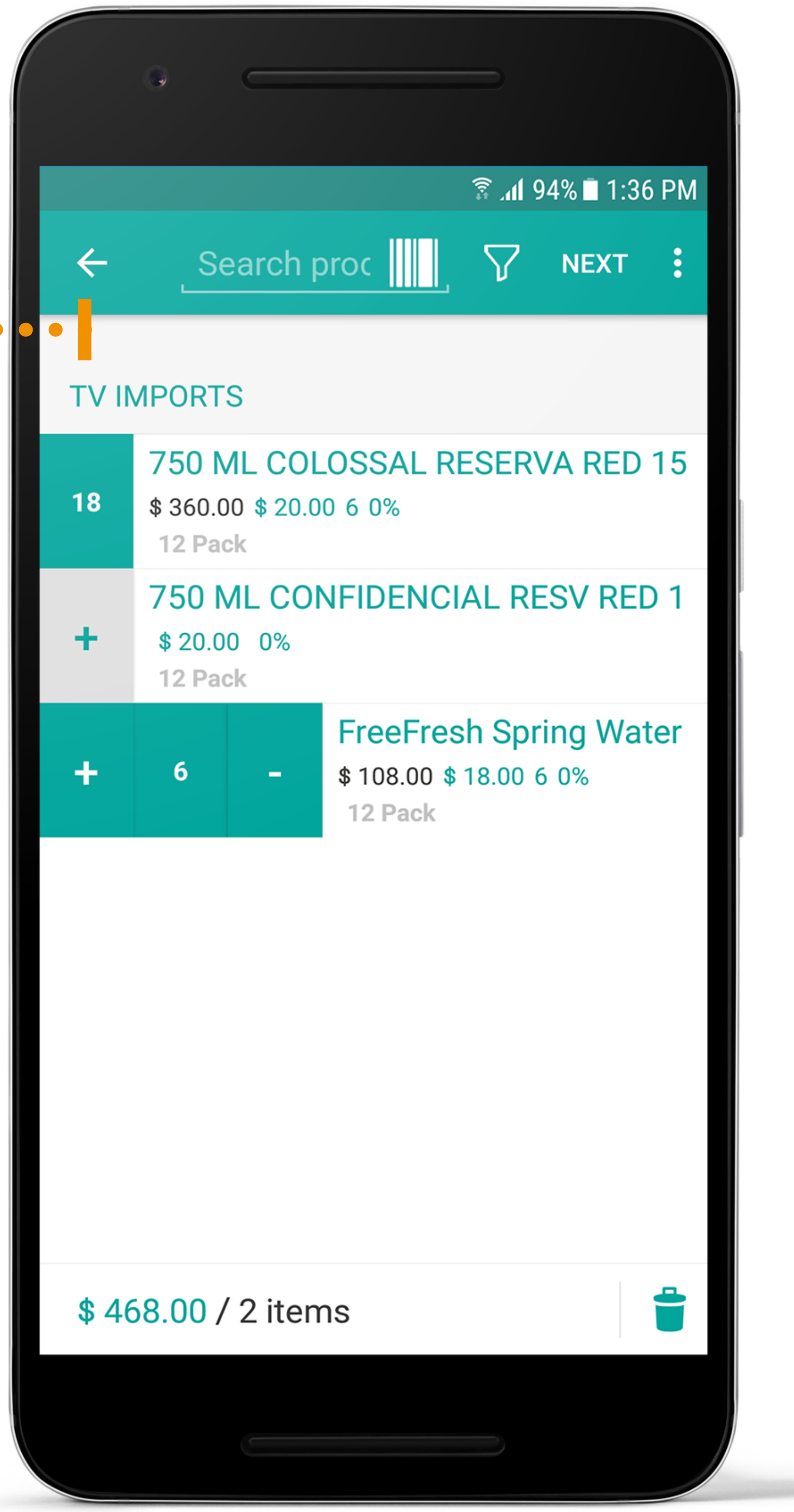
2. Click on yes to **confirm** your action and your photo will be deleted.

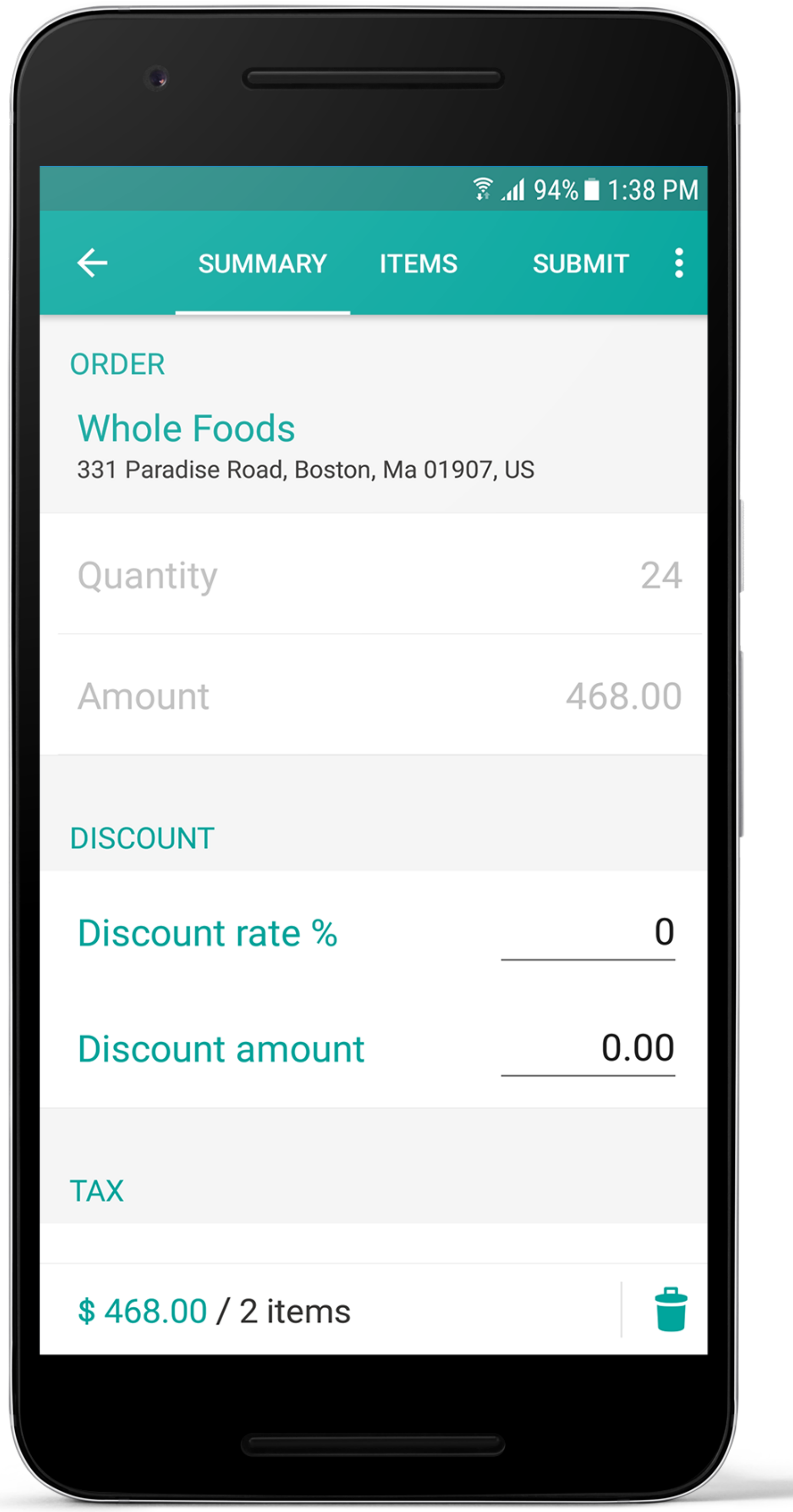


HOW TO PLACE A PURCHASE ORDER?

Using products in Repsly allows reps to fill out purchase orders easier, faster and reduces the number of errors in work.







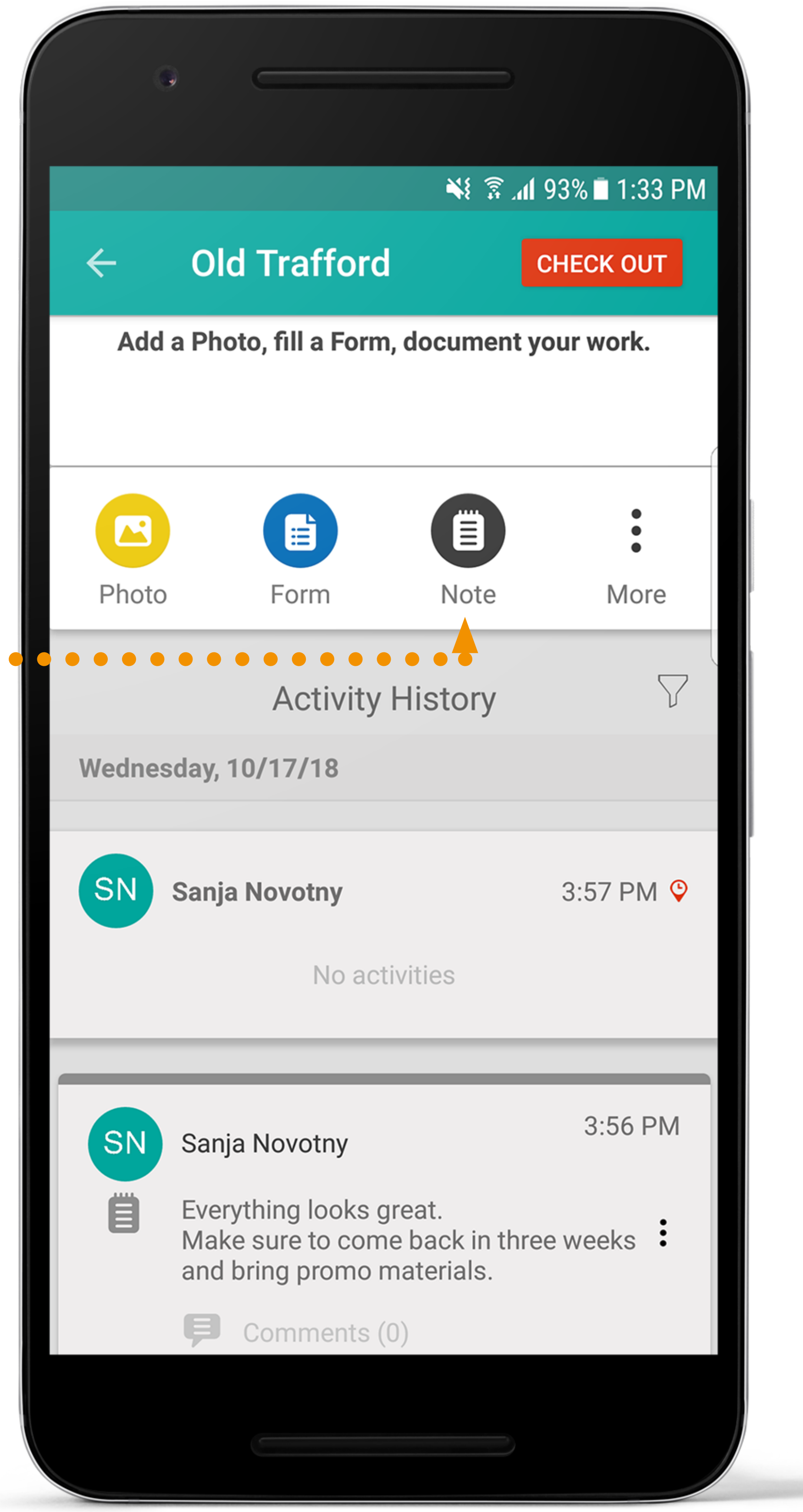
1 Press on the **My Places tab** and select the place where you are completing the purchase order. After checking in, tap on the **More button** and select **Order**.

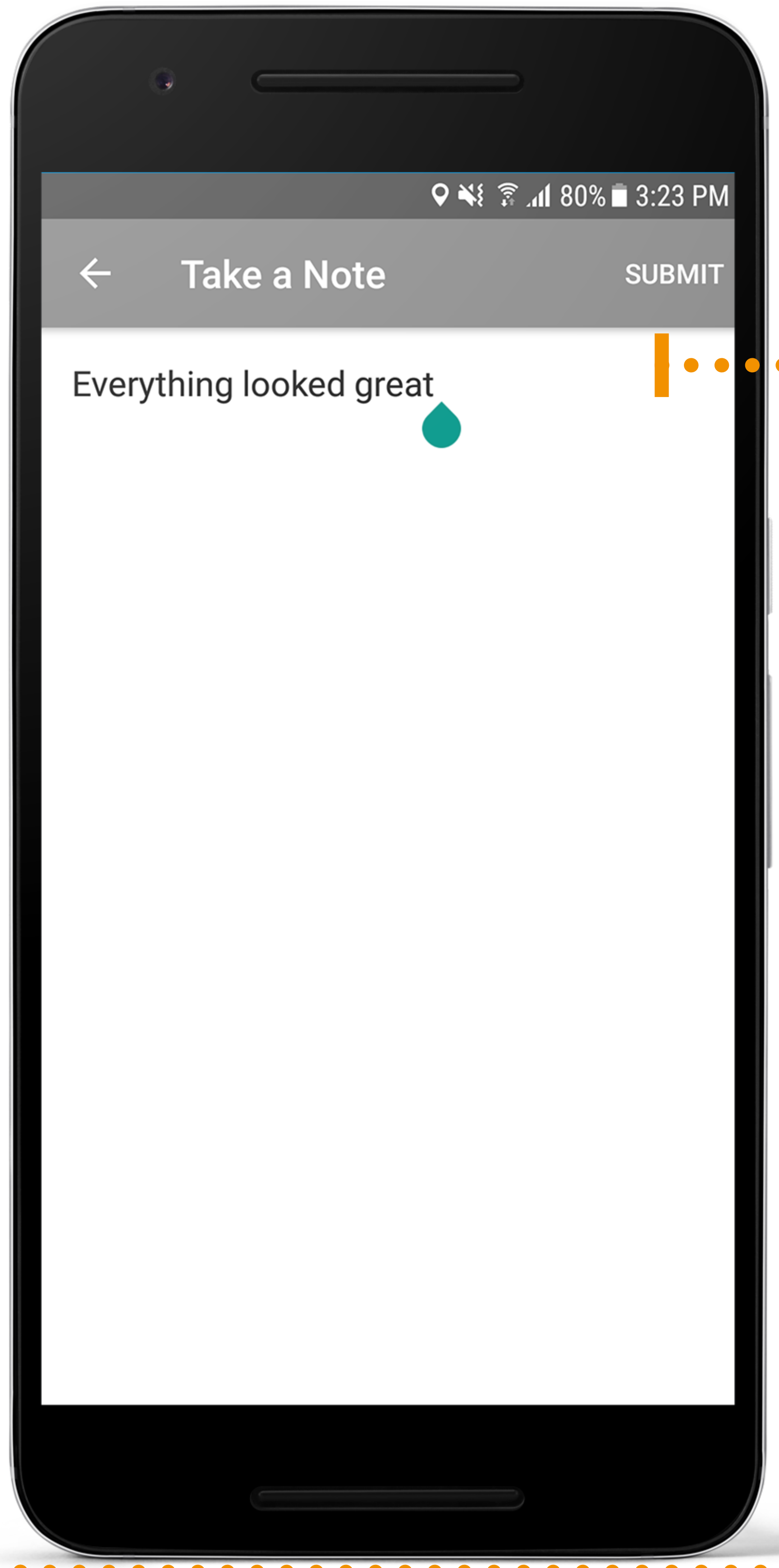
2 Select the appropriate **product group** and using "+" and "-" buttons enter the quantity of each product in the order. Once you are done with the product entry, click the **Next** button to review your order.

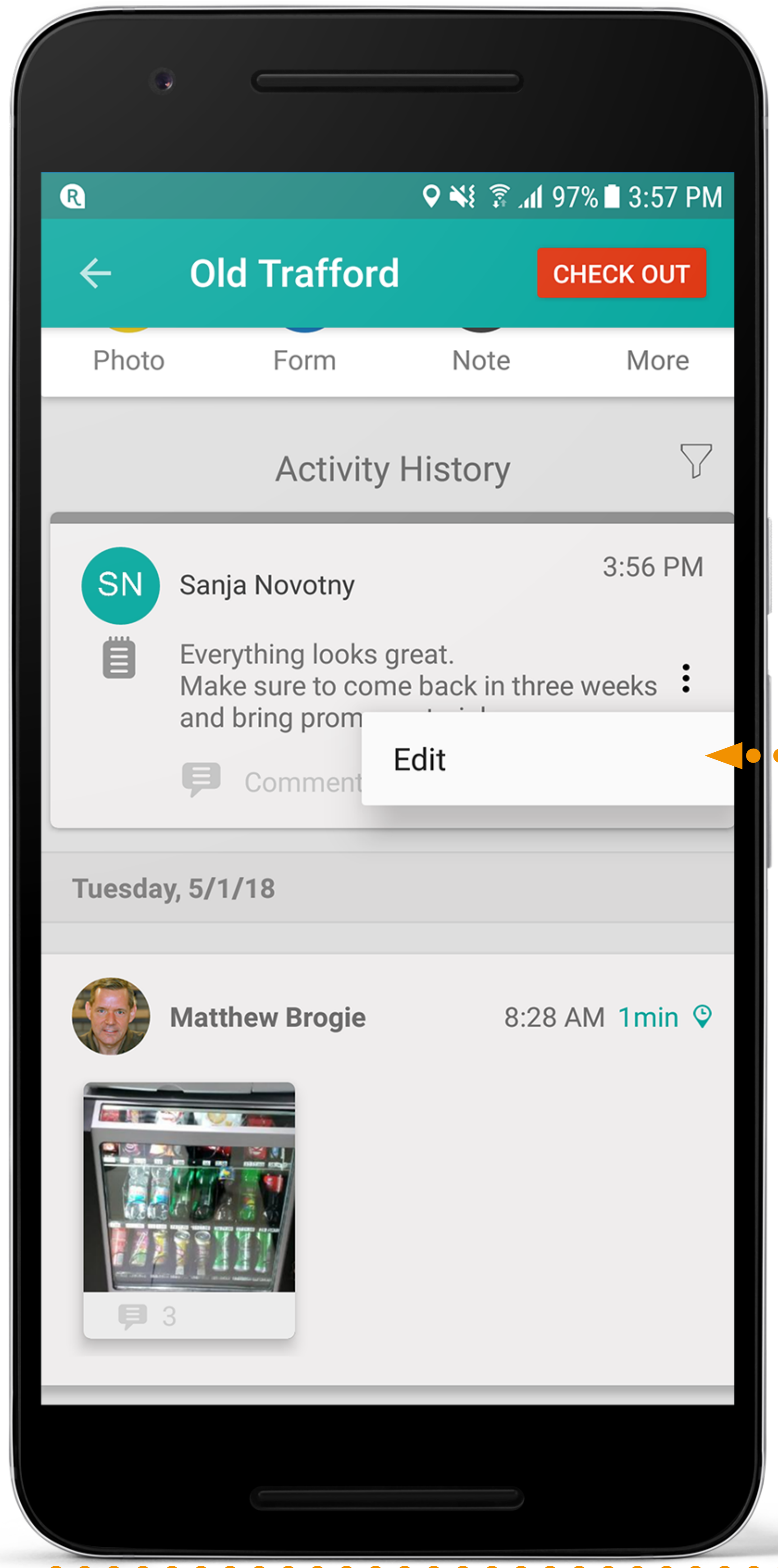
3 If your order is correct, click the **Submit** button. From there you can choose to either **Submit** or **Submit and Send By Email**.

HOW TO MAKE A NOTE?

Reps have the option to add a note about a place.
This can be a valuable way for reps to improve transparency between departments.







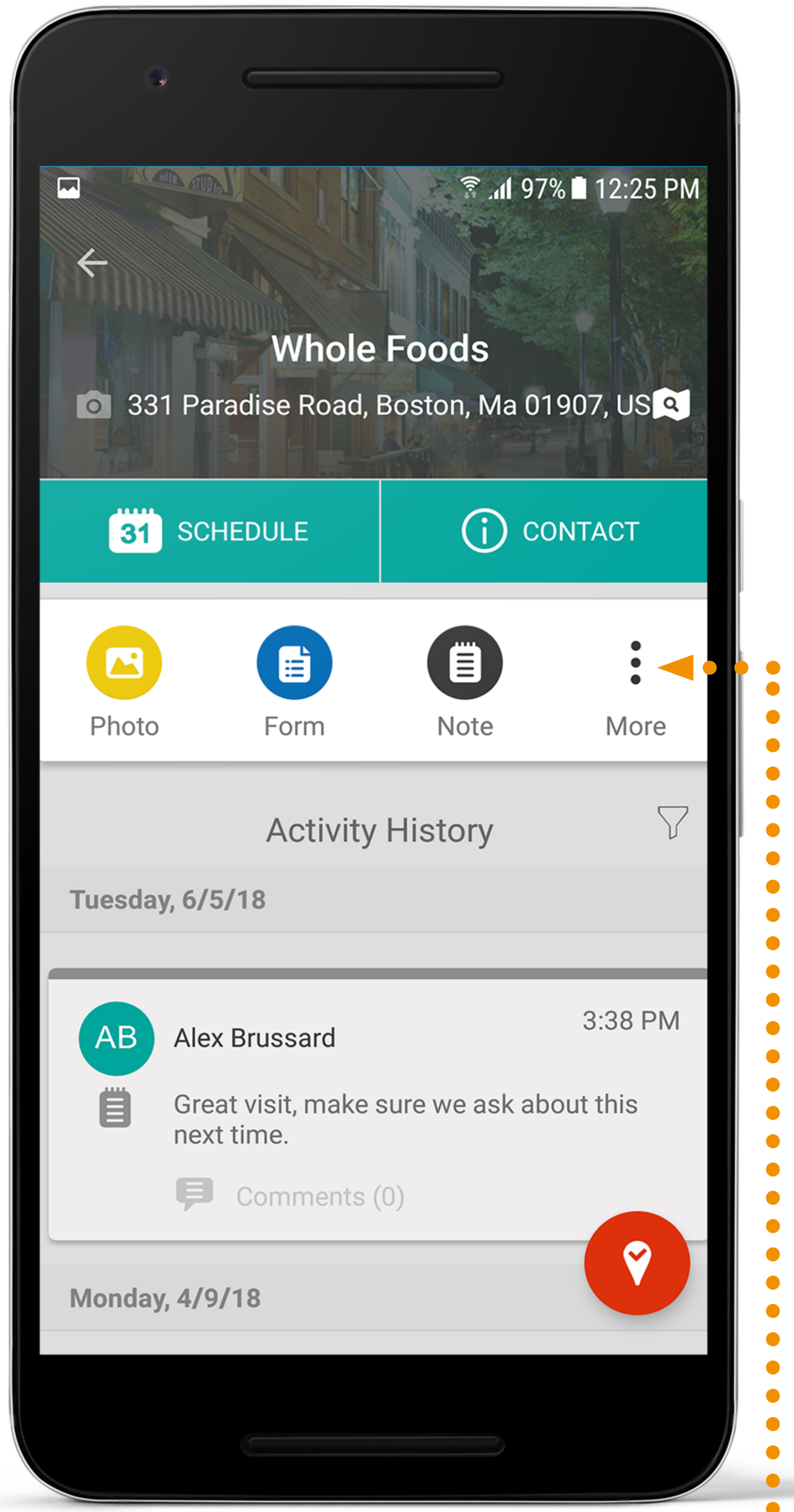
1 Click on the **My Places** tab and select the place for which you want to take a note. After **check in**, click on the **Note button**.

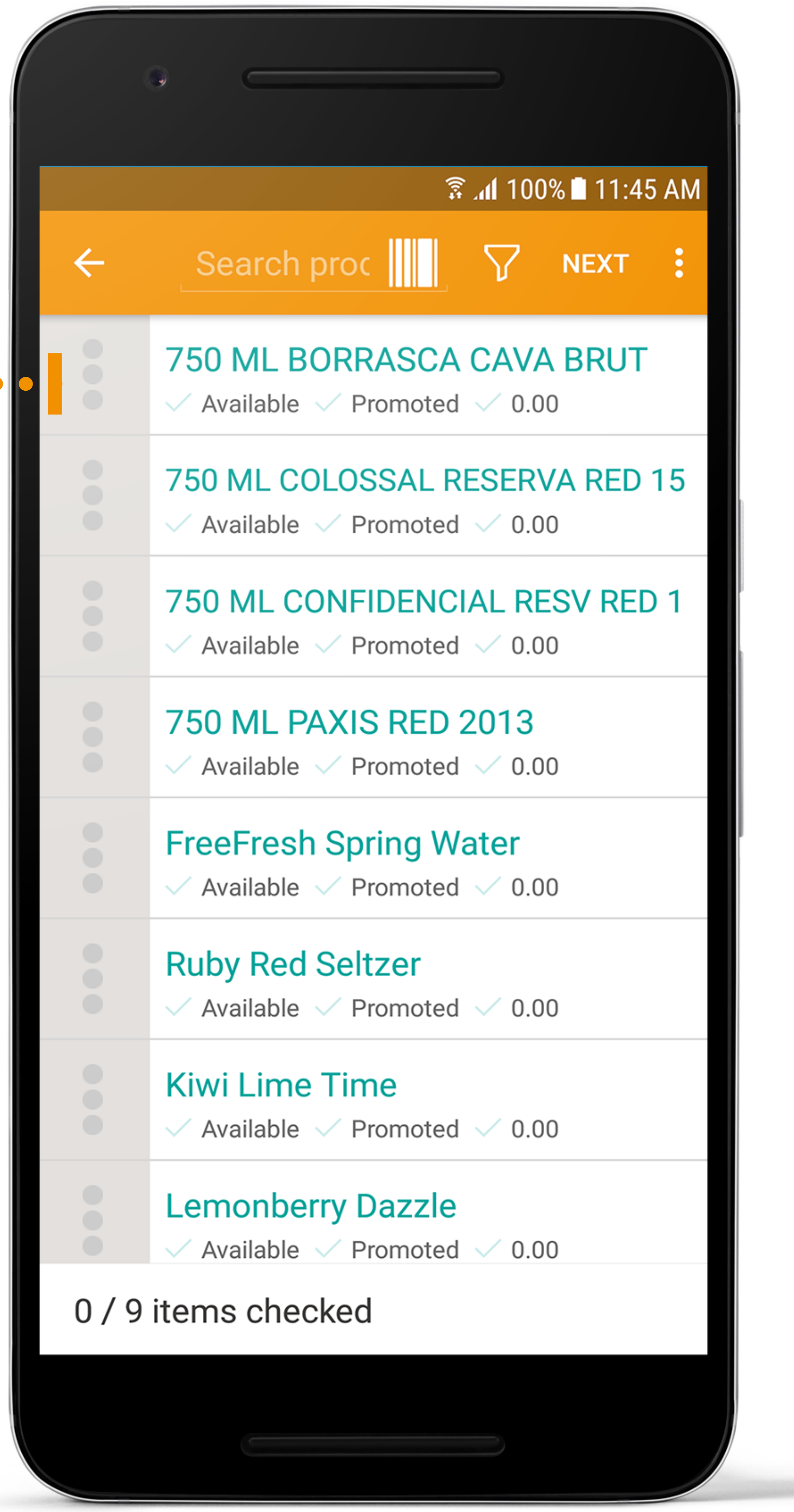
2 Write your note and once your note is complete, click the **Submit button**.

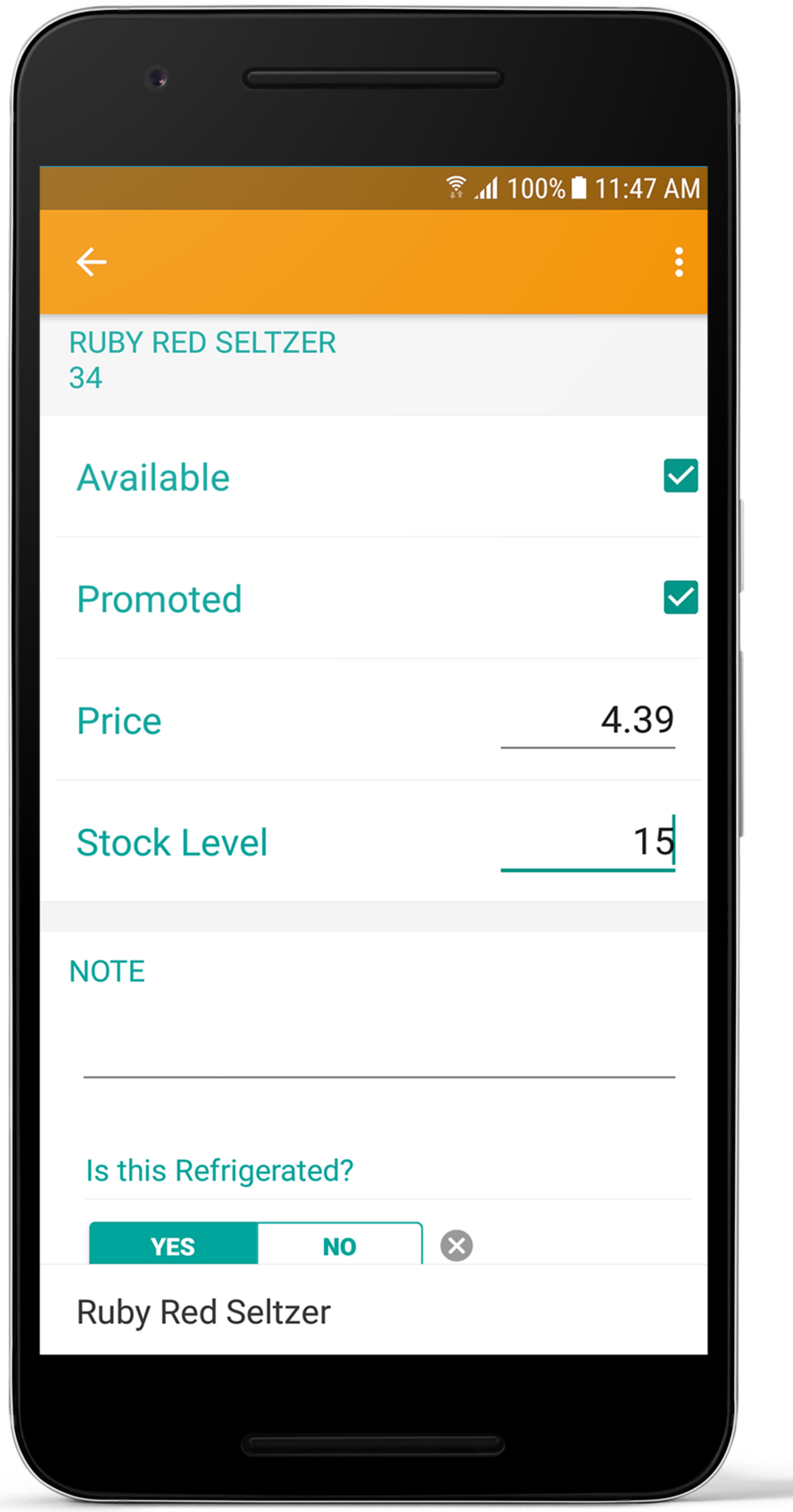
3 You can also edit your submitted notes by opening a note and clicking on edit in the right corner.

HOW TO FILL OUT A RETAIL AUDIT?

The Retail Audits are surveys that allow Reps and Managers to keep track of key product information.







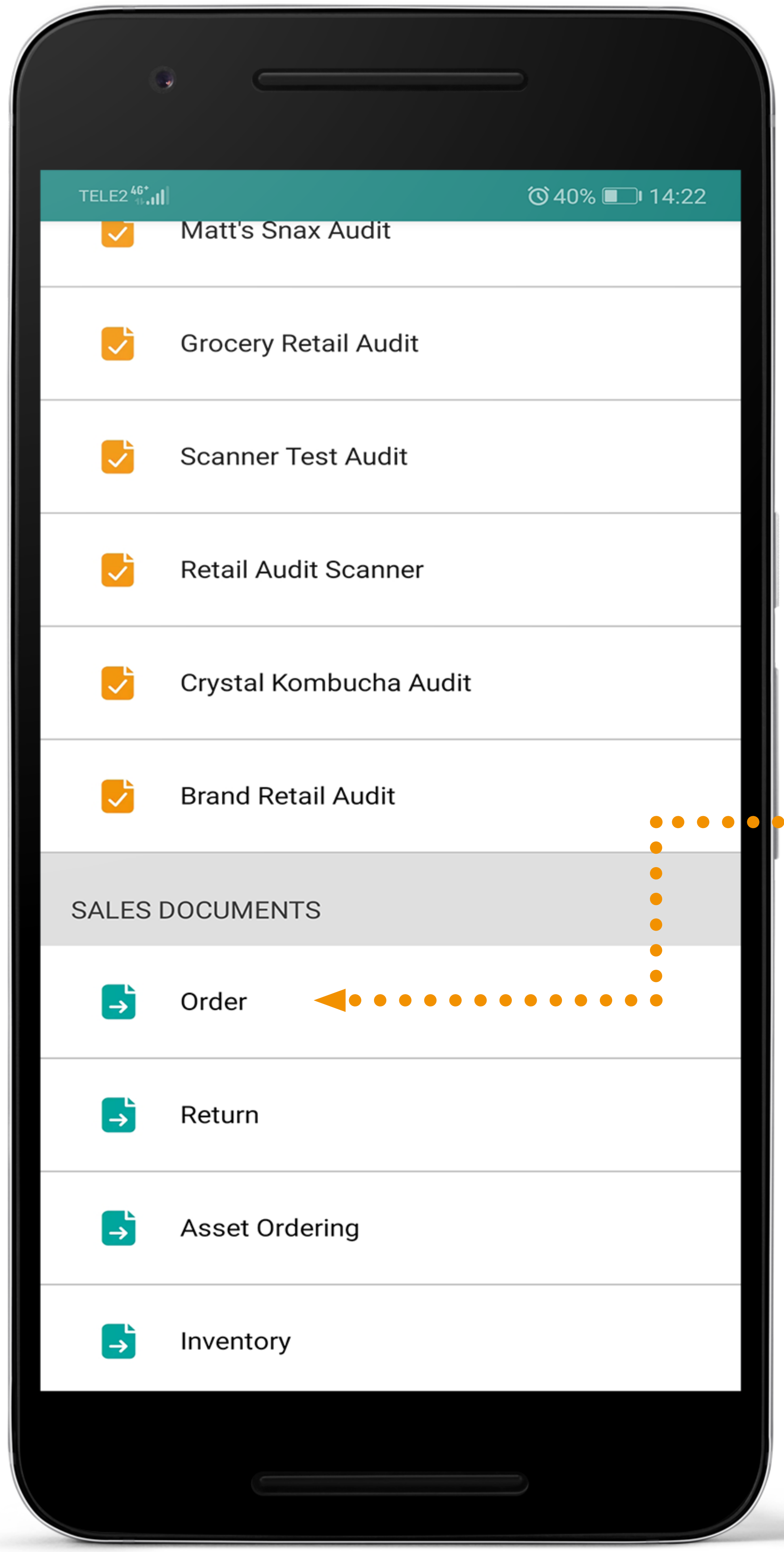
1 Press on the My Places tab and select the place. After checking in, tap on the More button and select Audits.

2 Complete the necessary fields and press Next. Use our barcode scanner to quickly Audit multiple SKUs.

3 Review the Retail Audit and press Done. If you want to email the Retail Audit, press the Submit and Send by Email button.

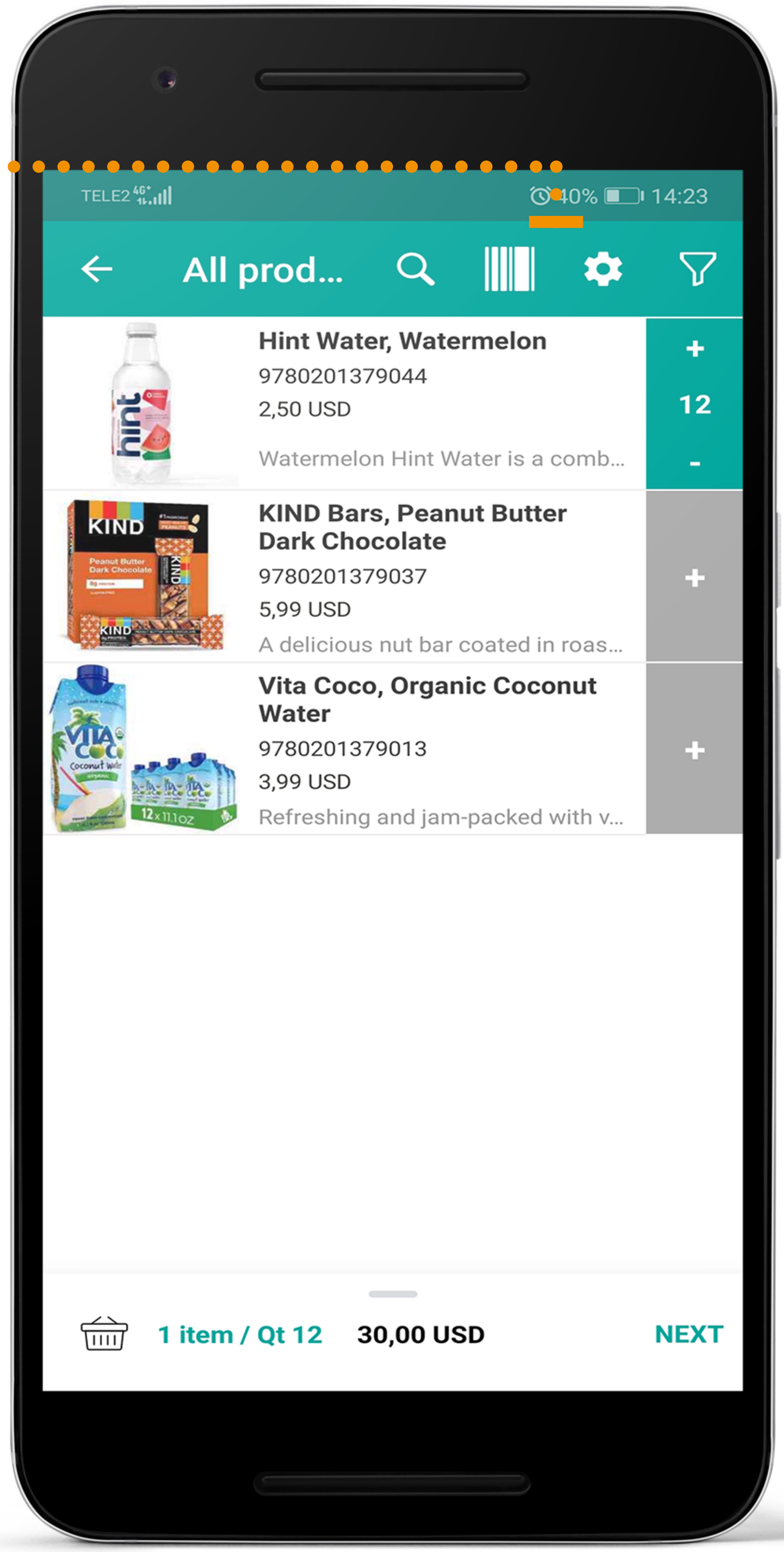
HOW TO PLACE AN ORDER?

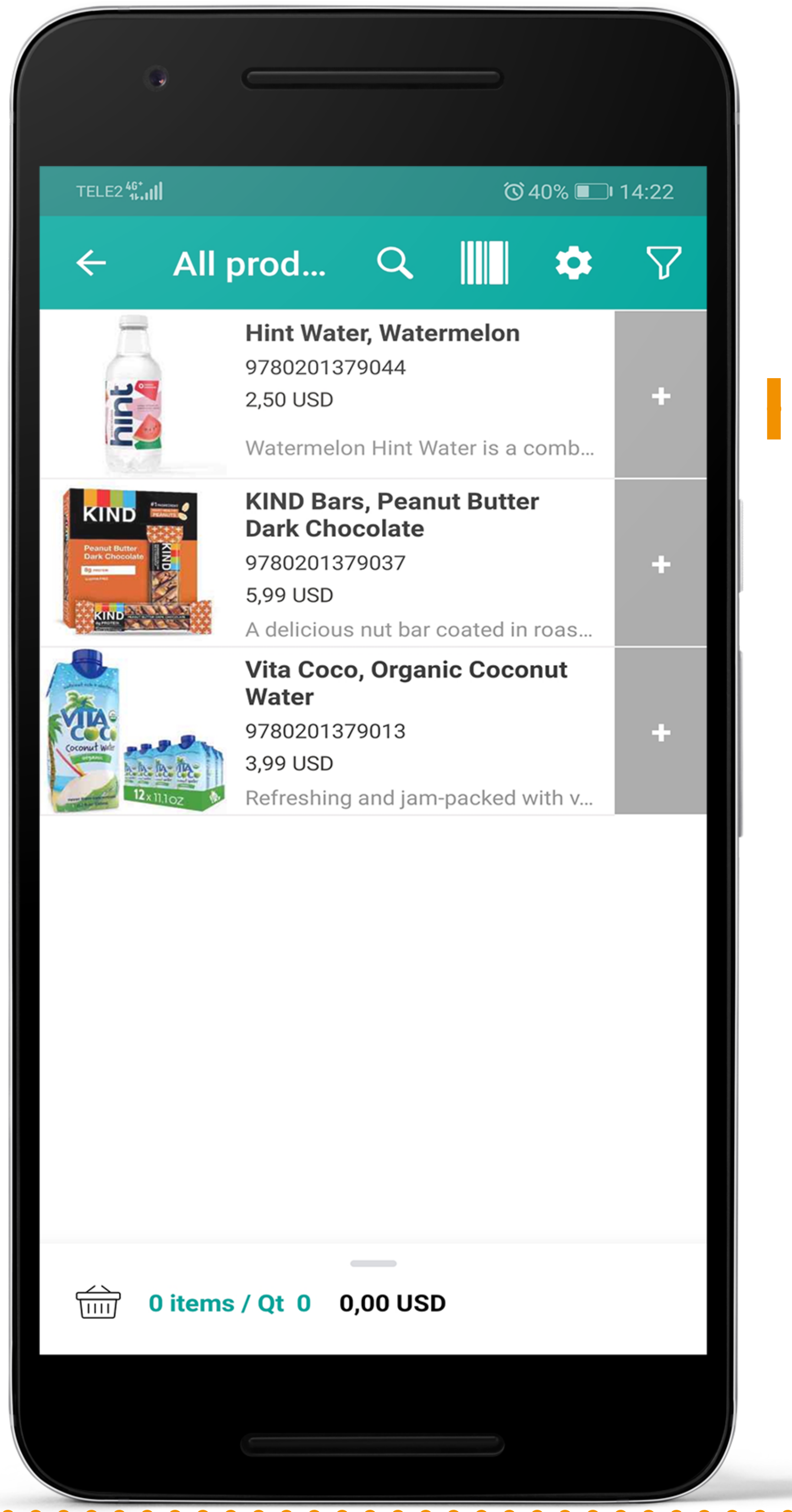
Using products in Repsly allows reps to fill out purchase orders easier, faster, and reduces the number of errors in work.



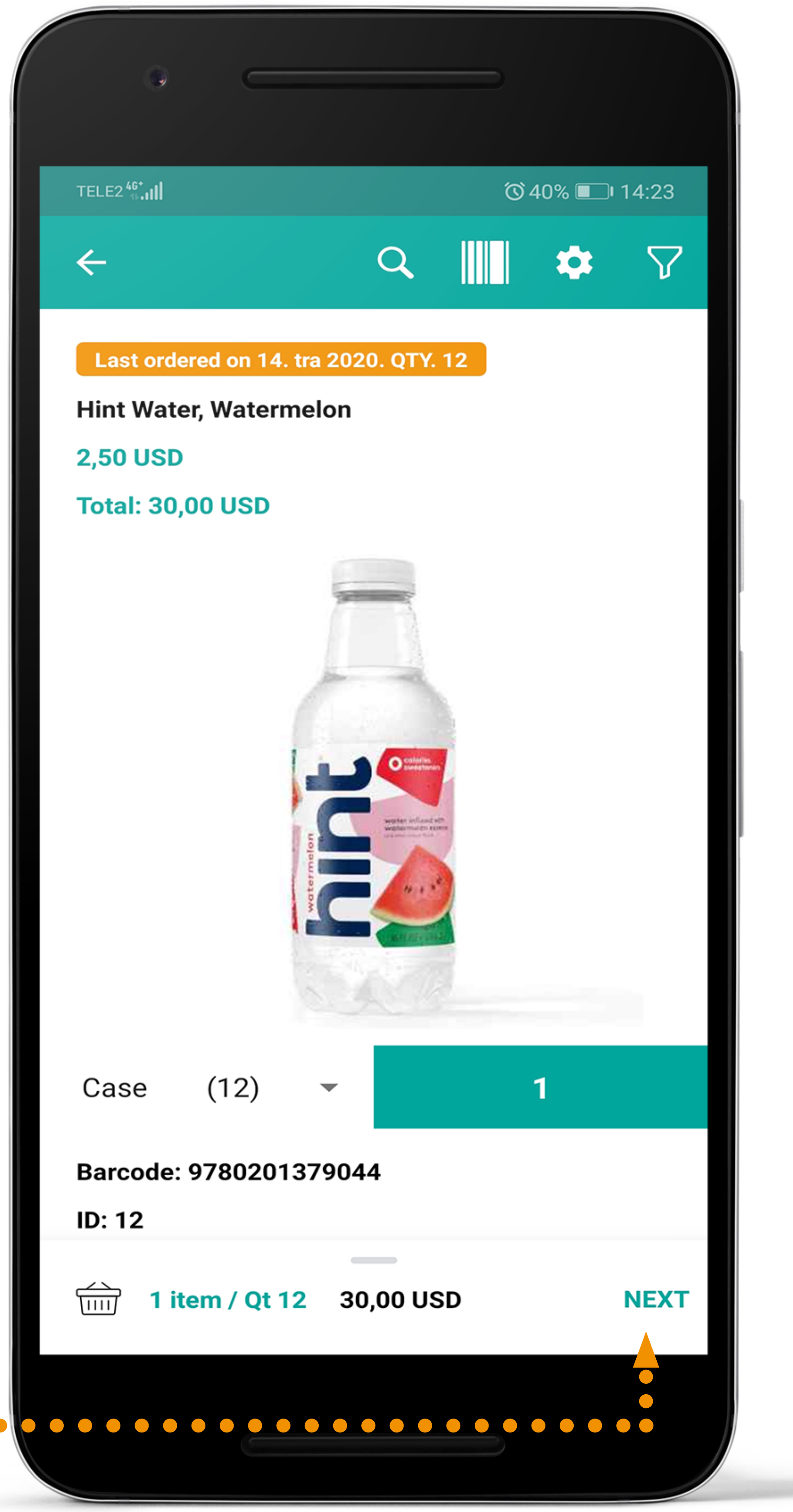
1 Click on the **More button** and choose the **Order Sales Document**.

2 To add products to your order, click on the product name, scan the barcode, or type in the name of your SKU. By clicking on the **Gear icon** you can set **Scan settings** to automatically add a specified order and quantity.

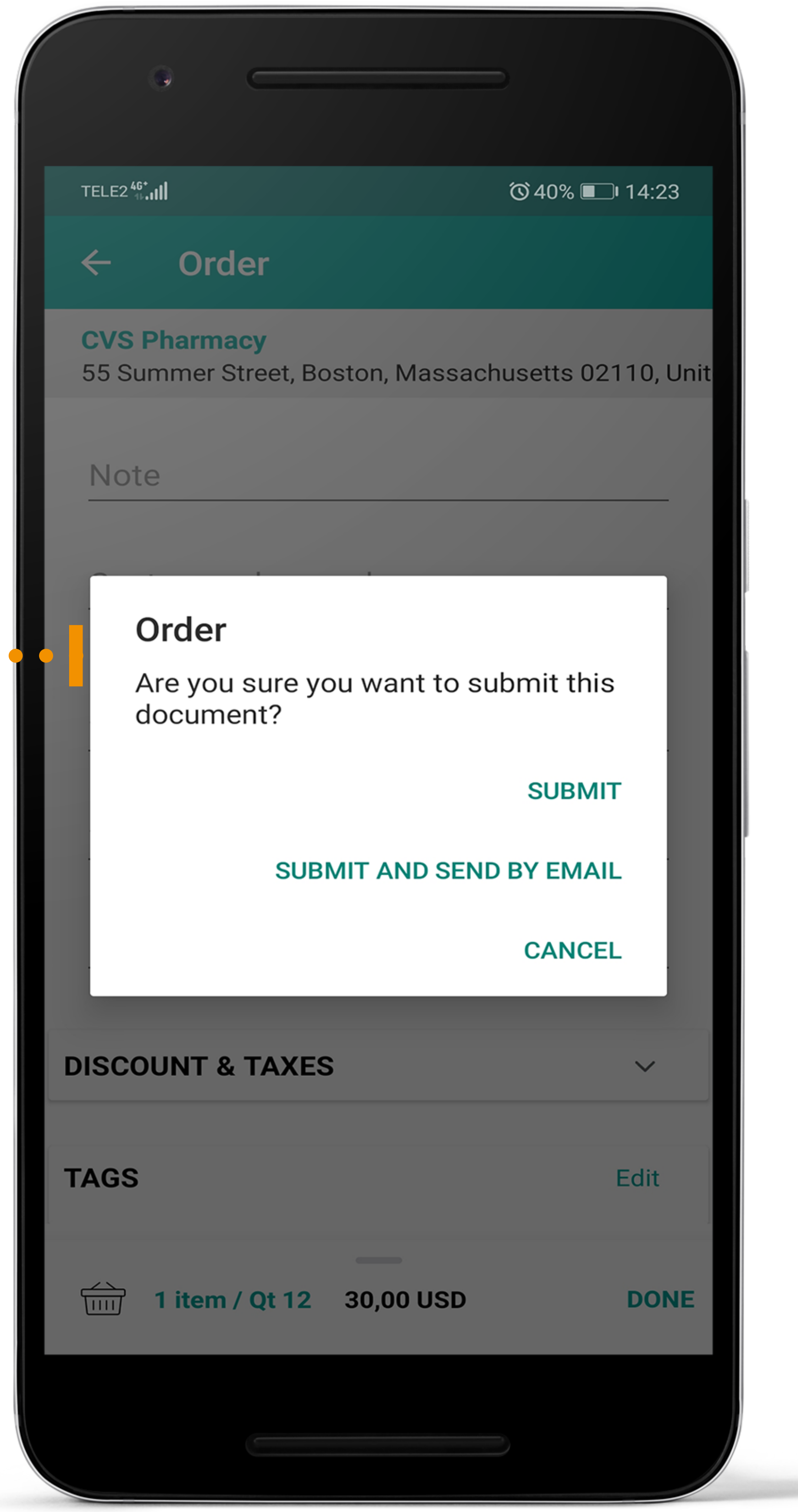




3 When you have selected your product, simply click on the **+ button** to add that product to your cart.



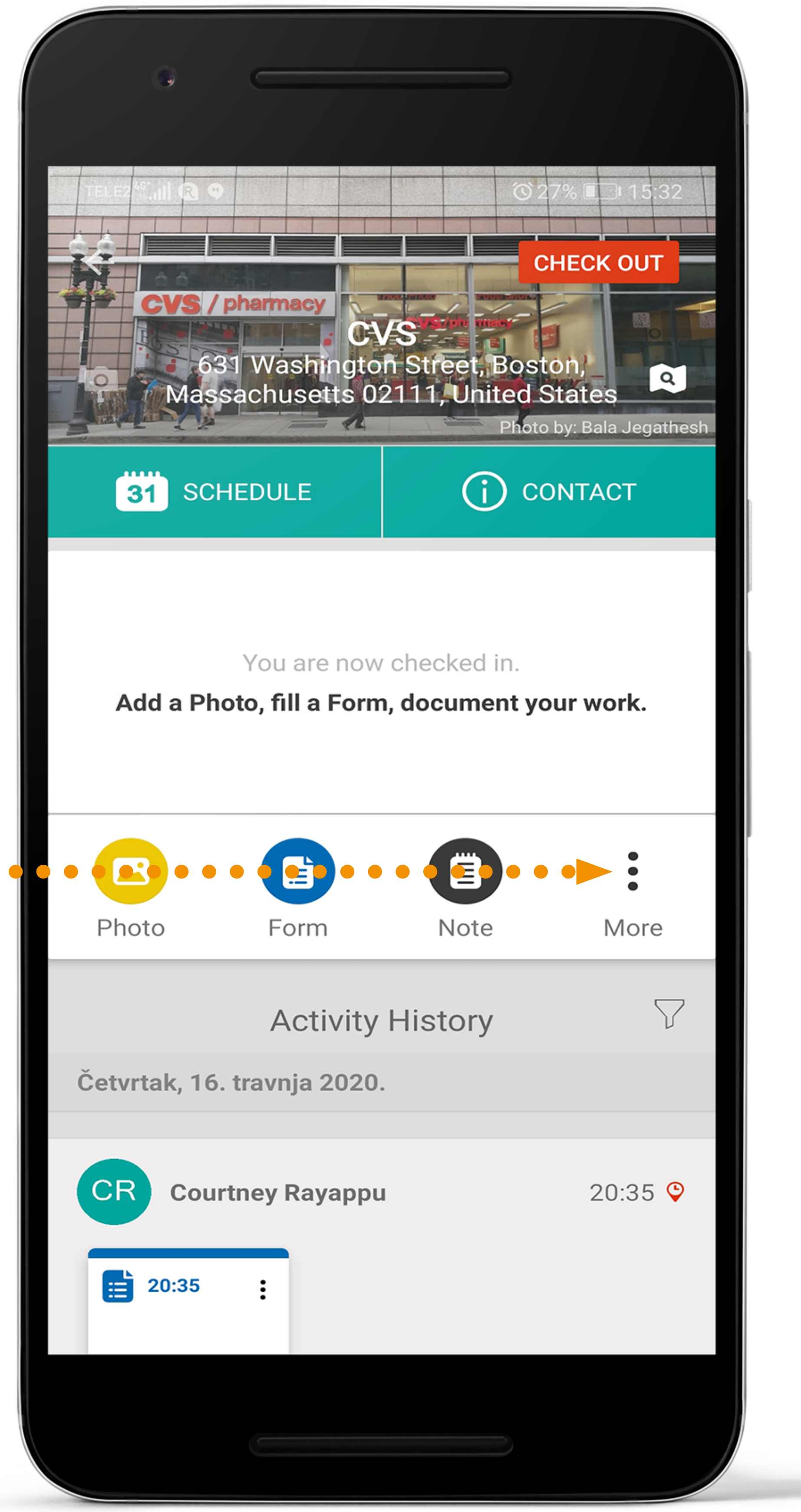
4 On the product profile, you can see product information, a product image, or when the product was last ordered at that store. You can also enter **Tax**, **Discounts**, **Notes**, a **Custom order number**, and the due date for the order in this section if applicable.



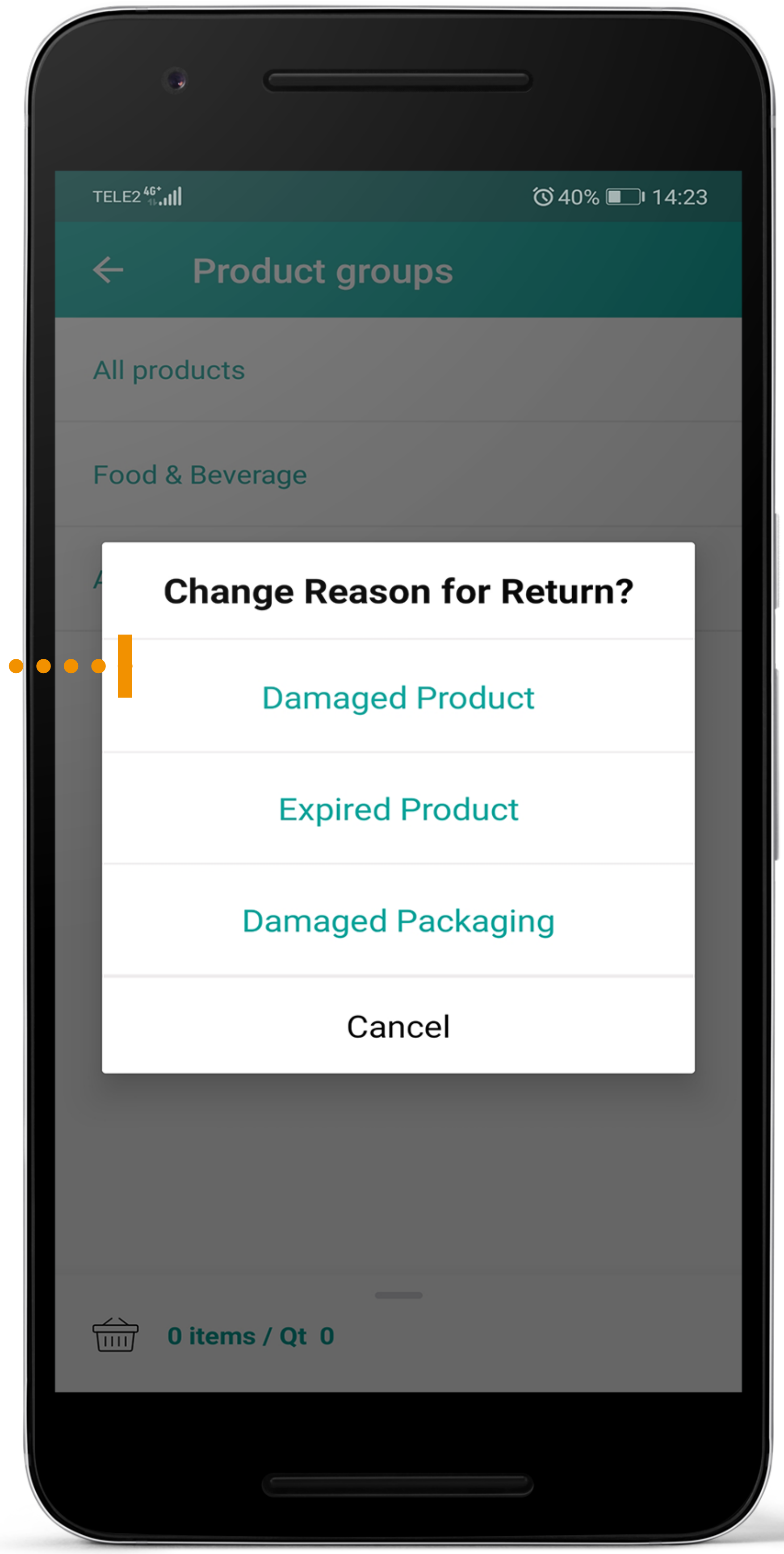
5 Once you have added all items to your cart, click on the **Next button**. Once you fill out all the information, click on the **Done button**, and choose **Submit.**

HOW TO PLACE RETURN?

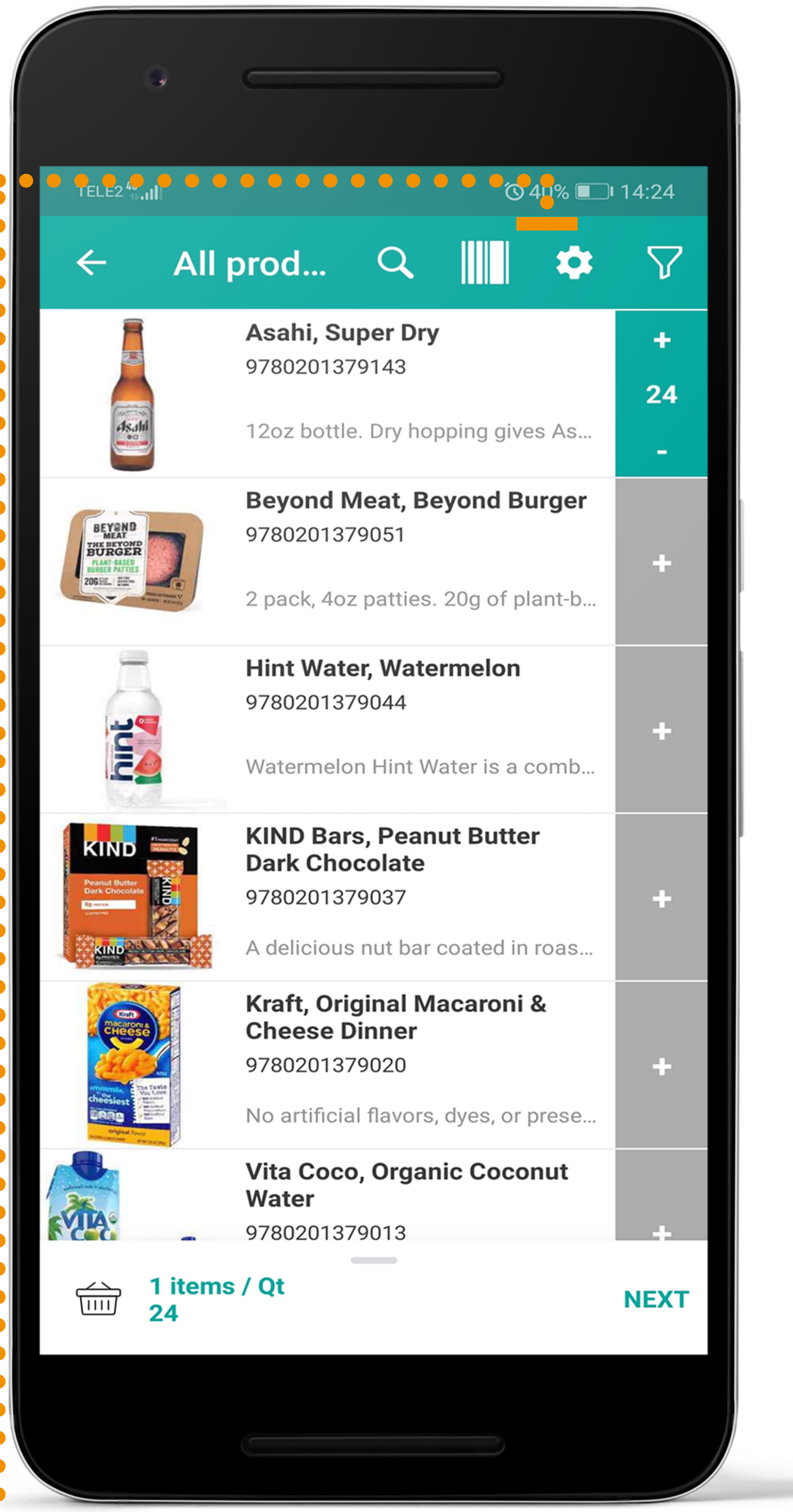
When you are ready to place a return order, please follow these steps.



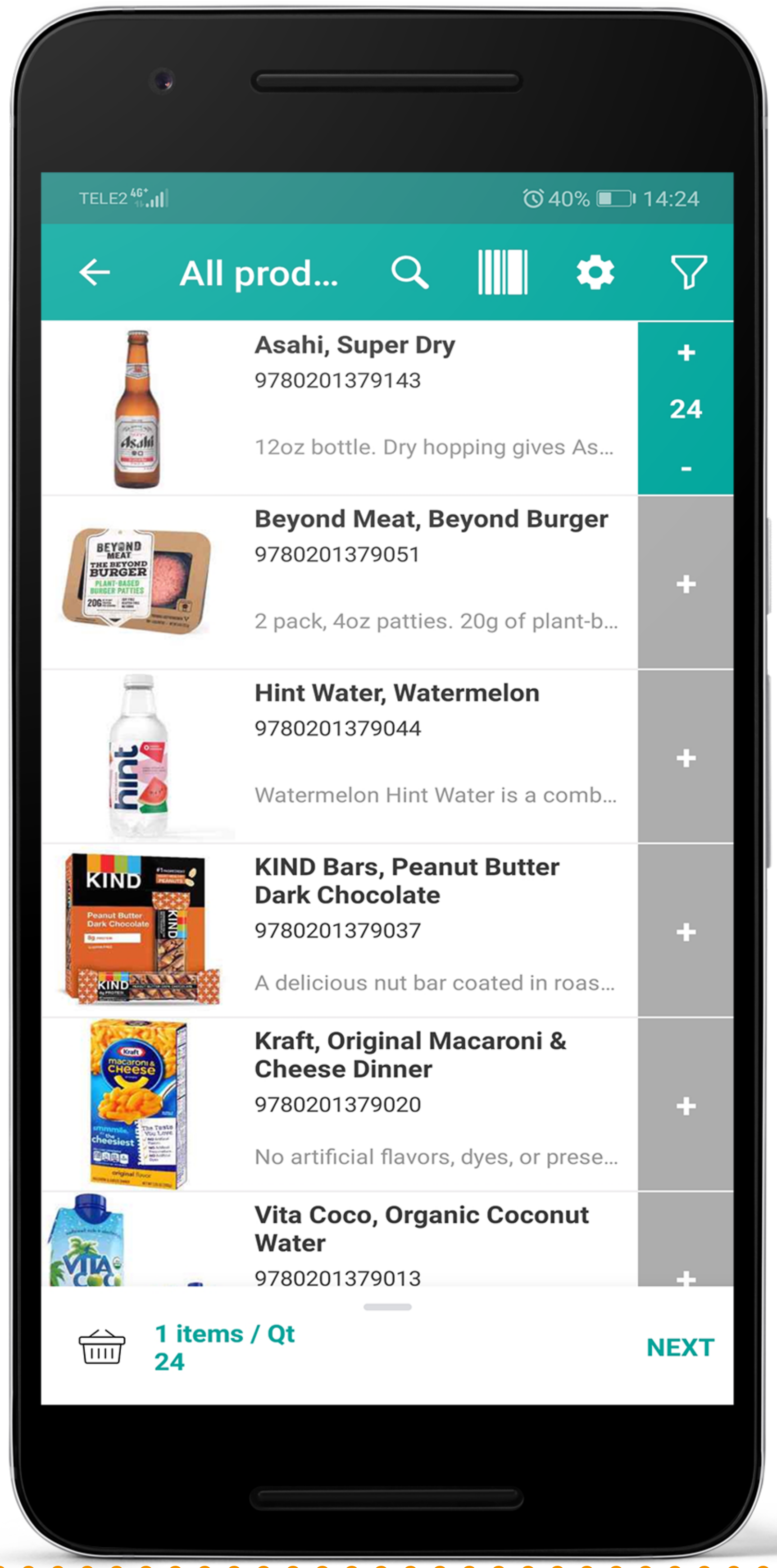
1 Click on the More button.



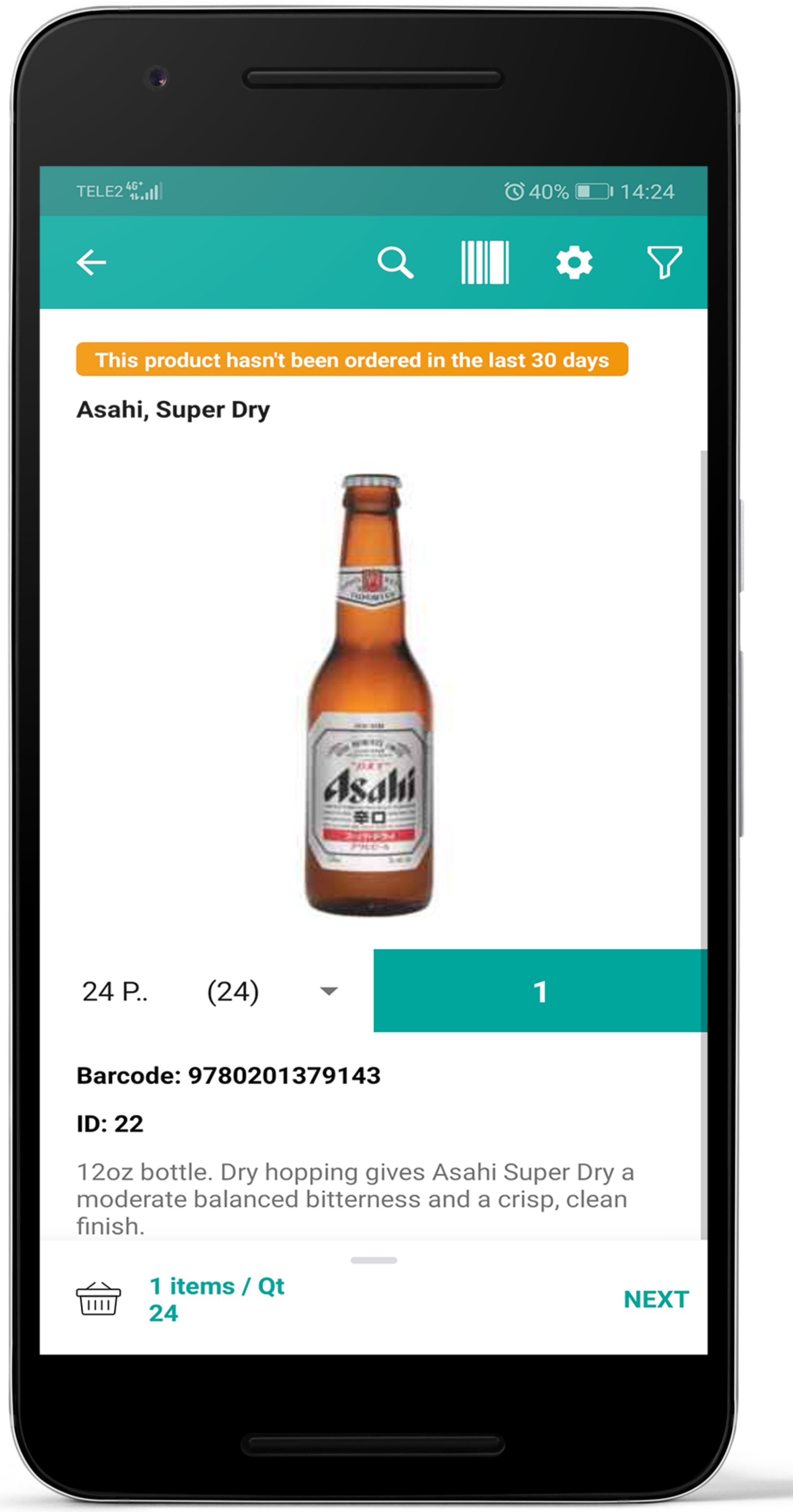
2 Now choose the Return document. You will then be prompted to pick from the right product group.



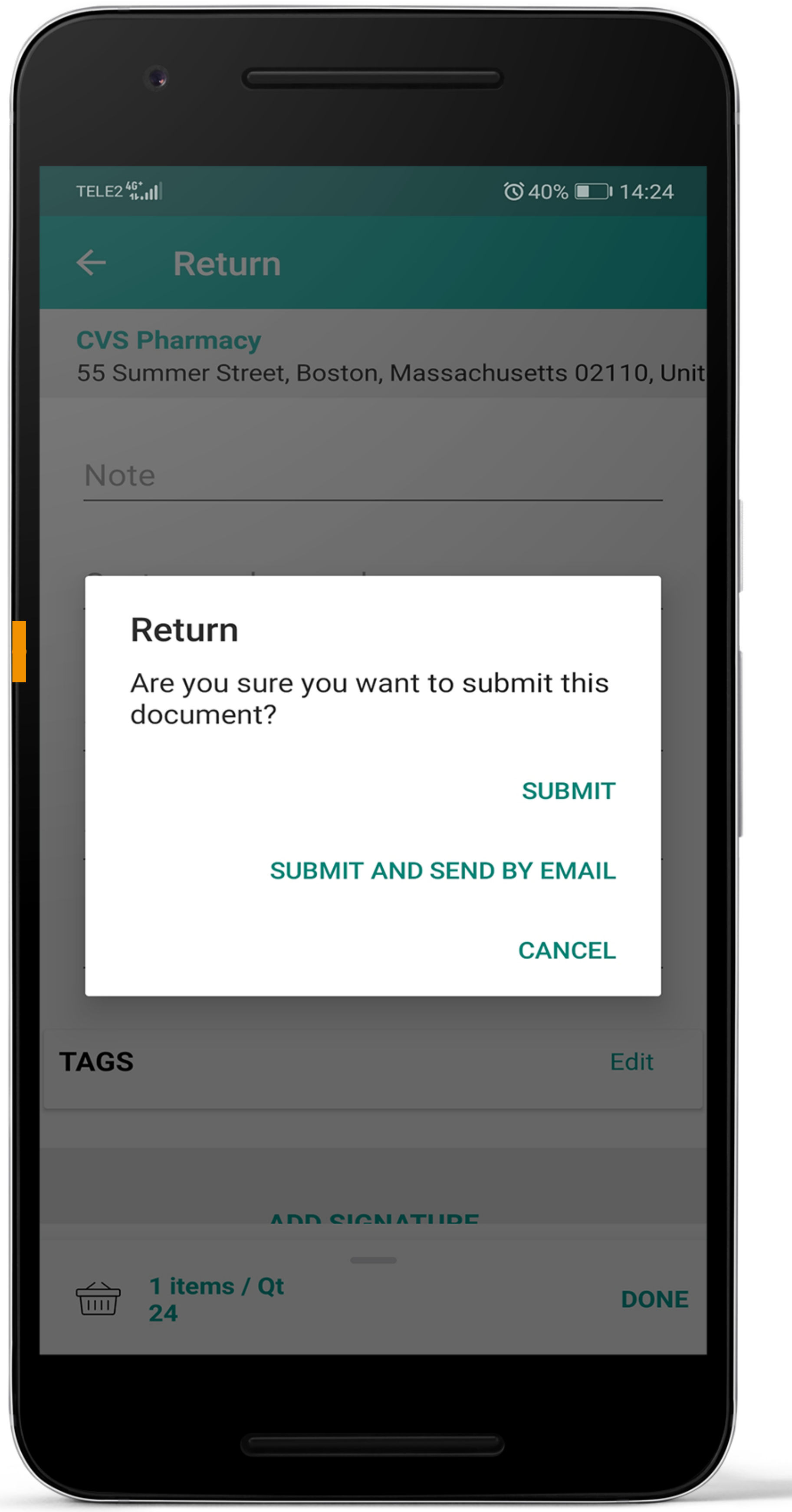
3 To add products to your return, click on the product name, scan the barcode, or type in the name of your SKU. By clicking on the Gear icon you can set Scan settings to automatically add a specified order and quantity.



4 When you have selected your product, simply click on the + button to add that product to your cart.



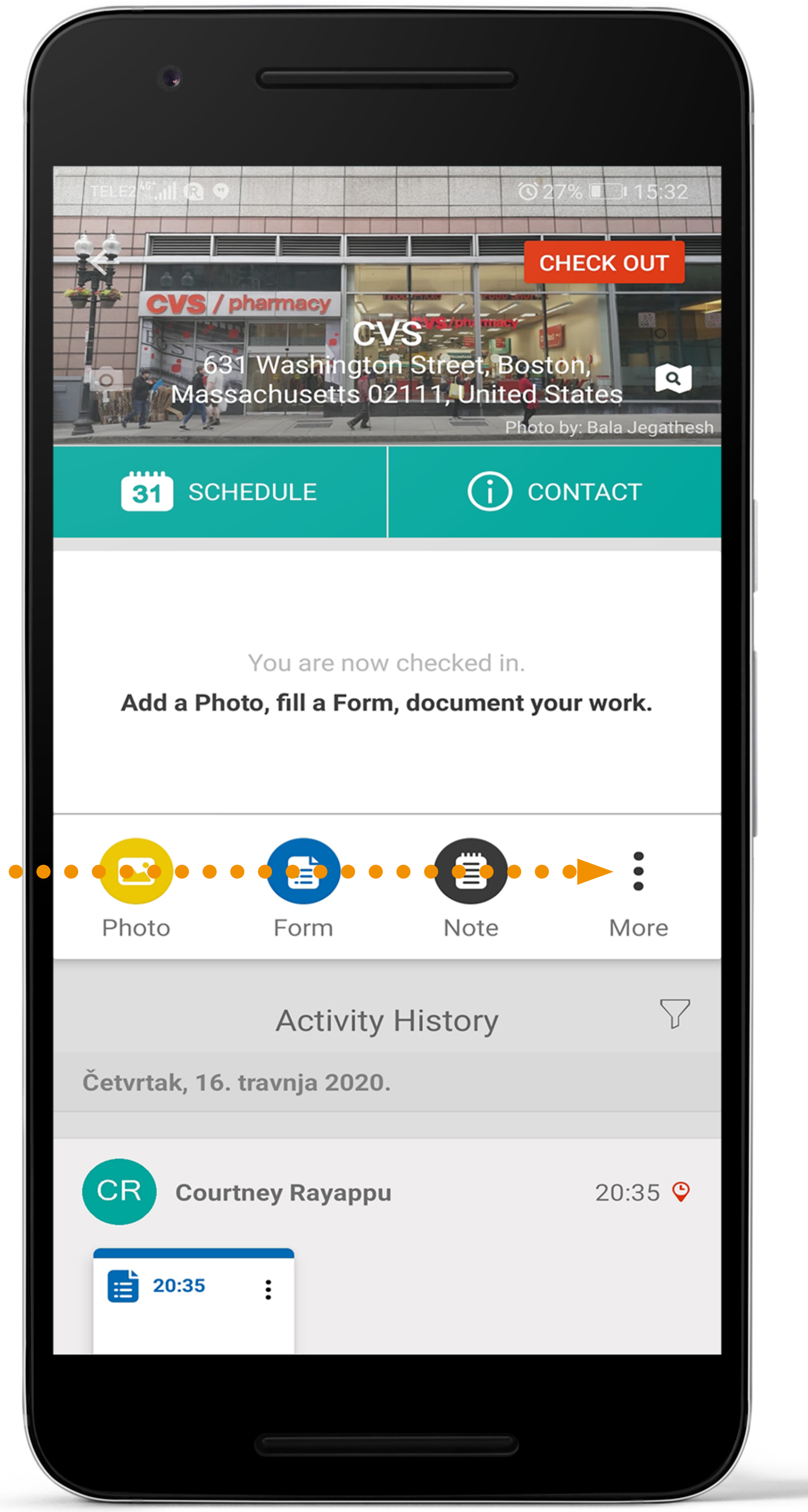
5 On the product profile, you can see product information, a product image, or when the product was last returned at that store.

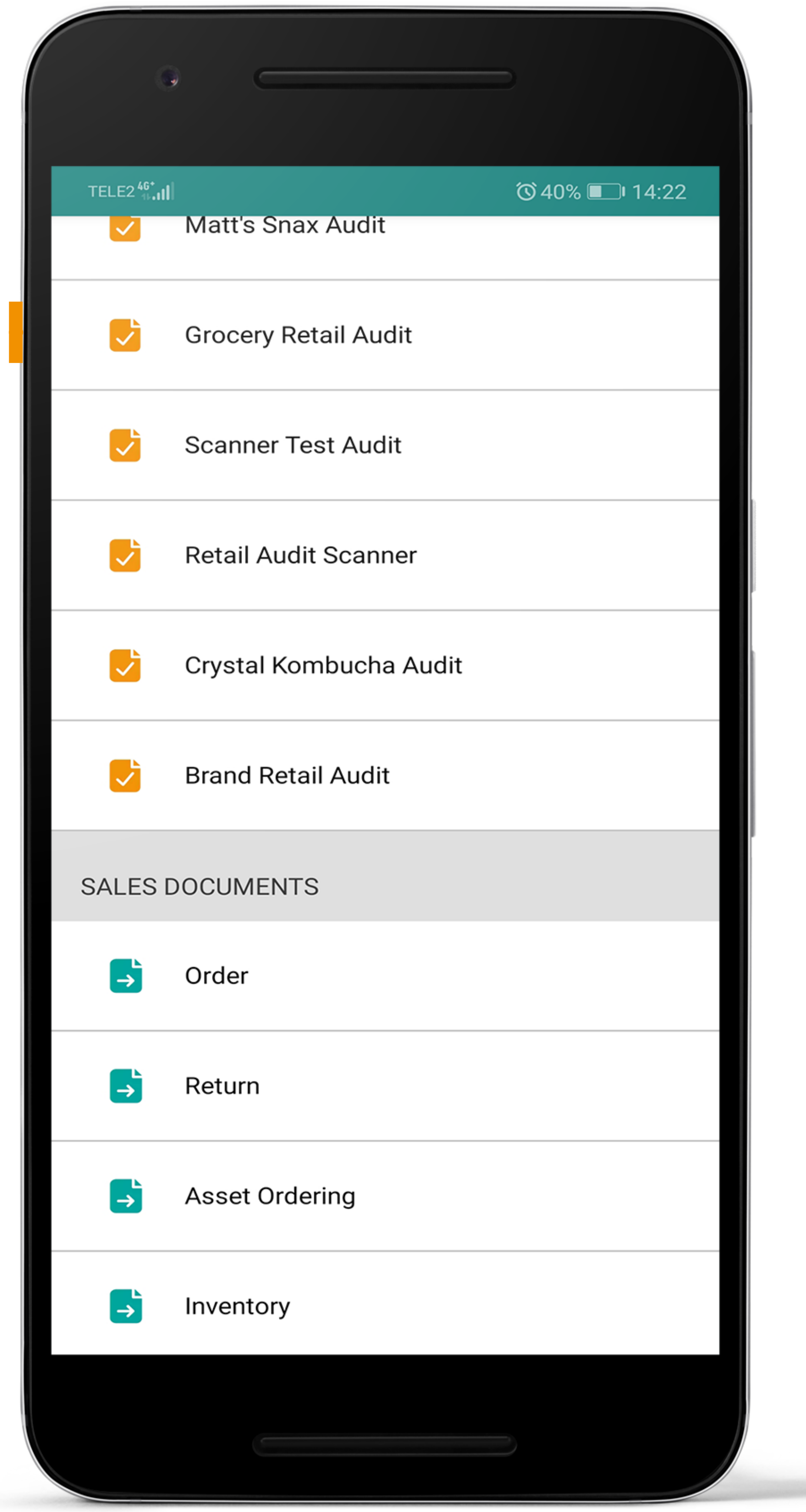


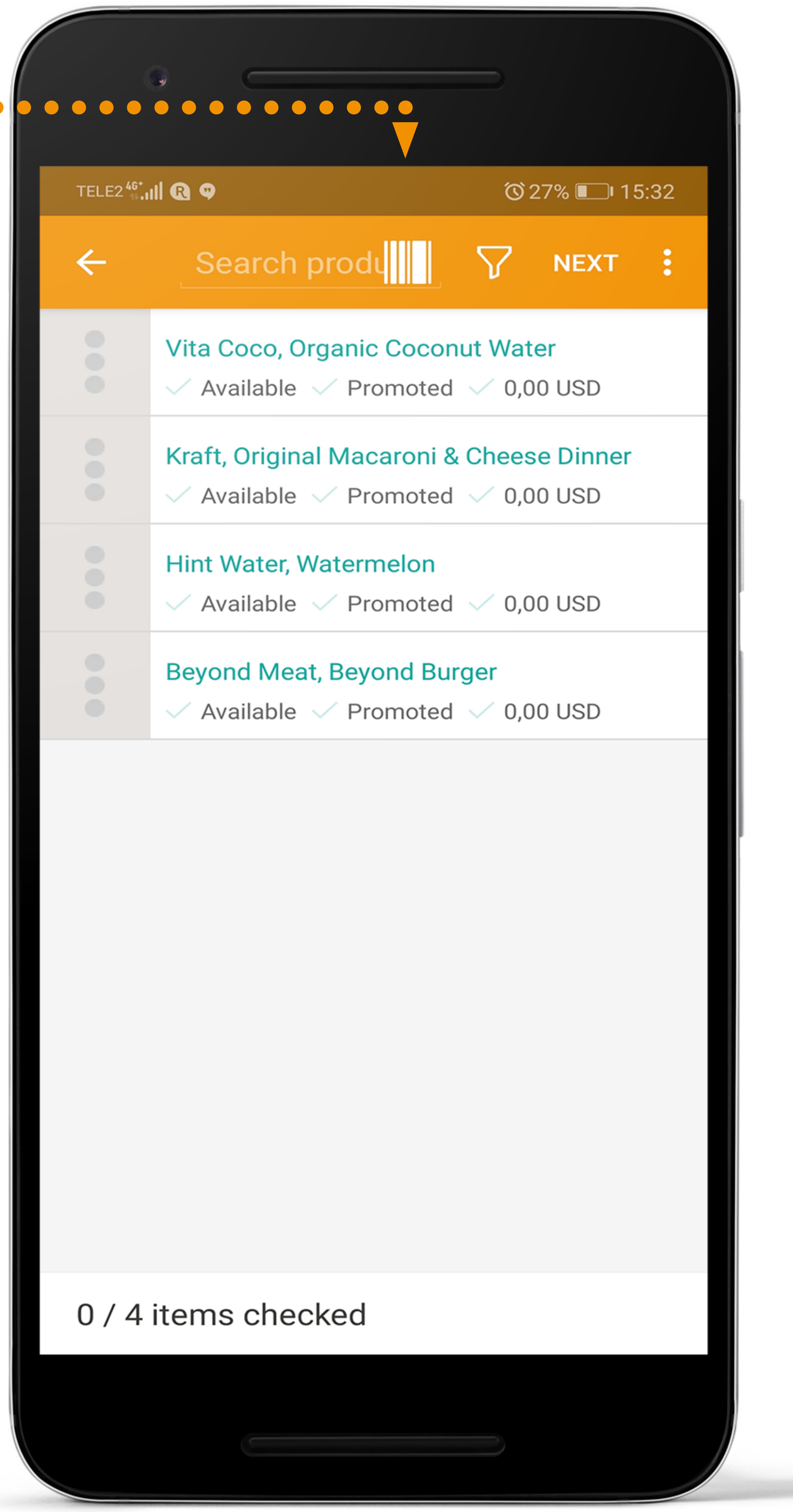
6 Once you have added all items to your cart, click on the Next button, and choose Submit.

HOW TO USE THE BARCODE SCANNER?

The Barcode Scanner allows reps to easily scan products during a Retail Audit or Order, to speed up finding products from a long list.







1 Go to the My Places list and choose the place that you are visiting. Check-in using the **Red Icon** and click on the **More button**.

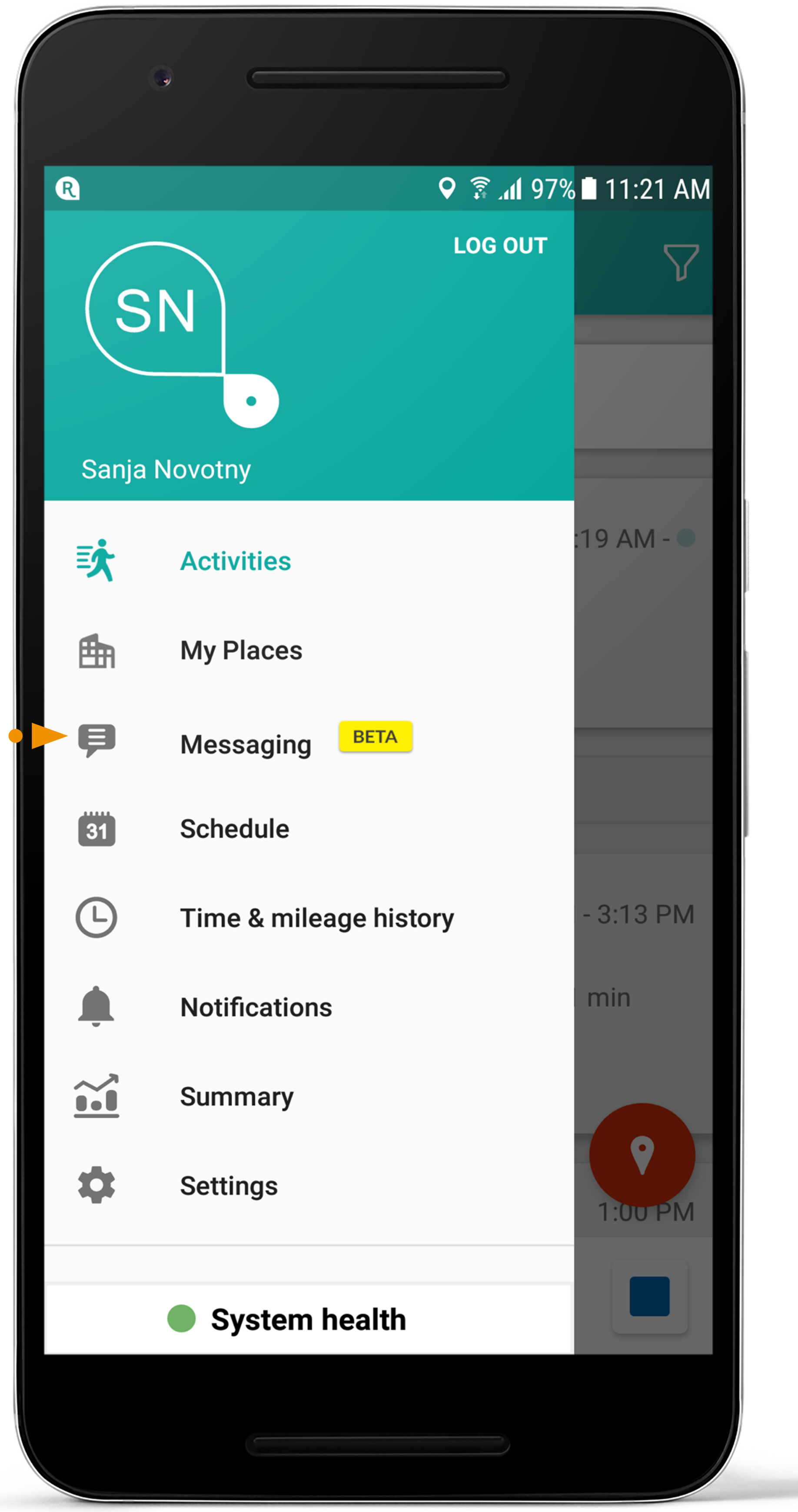
2 Click on the **Retail Audit** or **Order option**. Select the activity you want to perform.

3 Click the **Barcode scanner icon**, located near the search bar. You can then use your mobile device to utilize the Barcode scanner, by using your camera. *Note: the Barcode scanner will only recognize products that have been previously entered into the Repsly's Web app).*

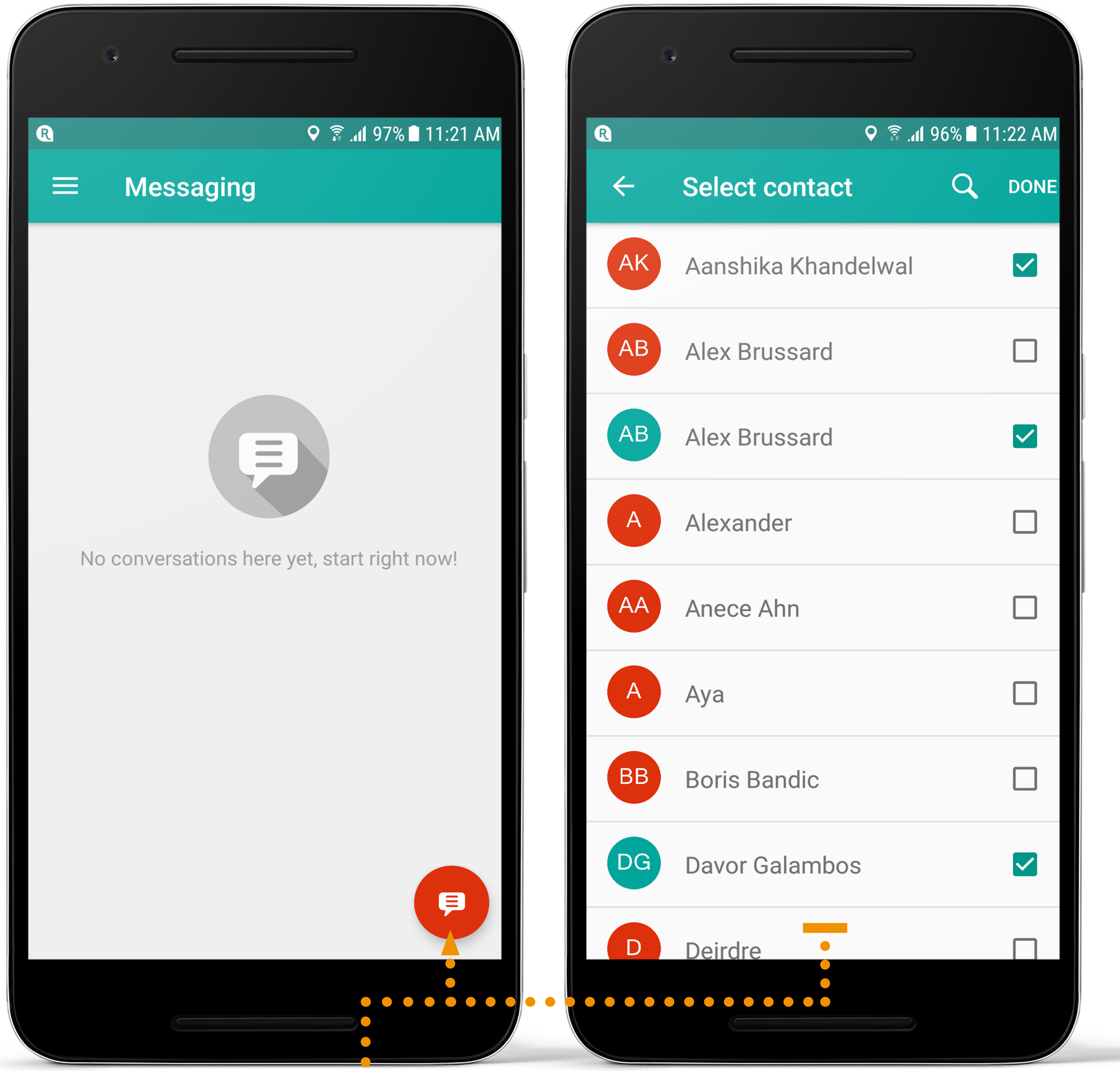
HOW TO MESSAGE?

Messaging is our new feature for sharing insights or wins (including photos) in context while reps are doing their work.

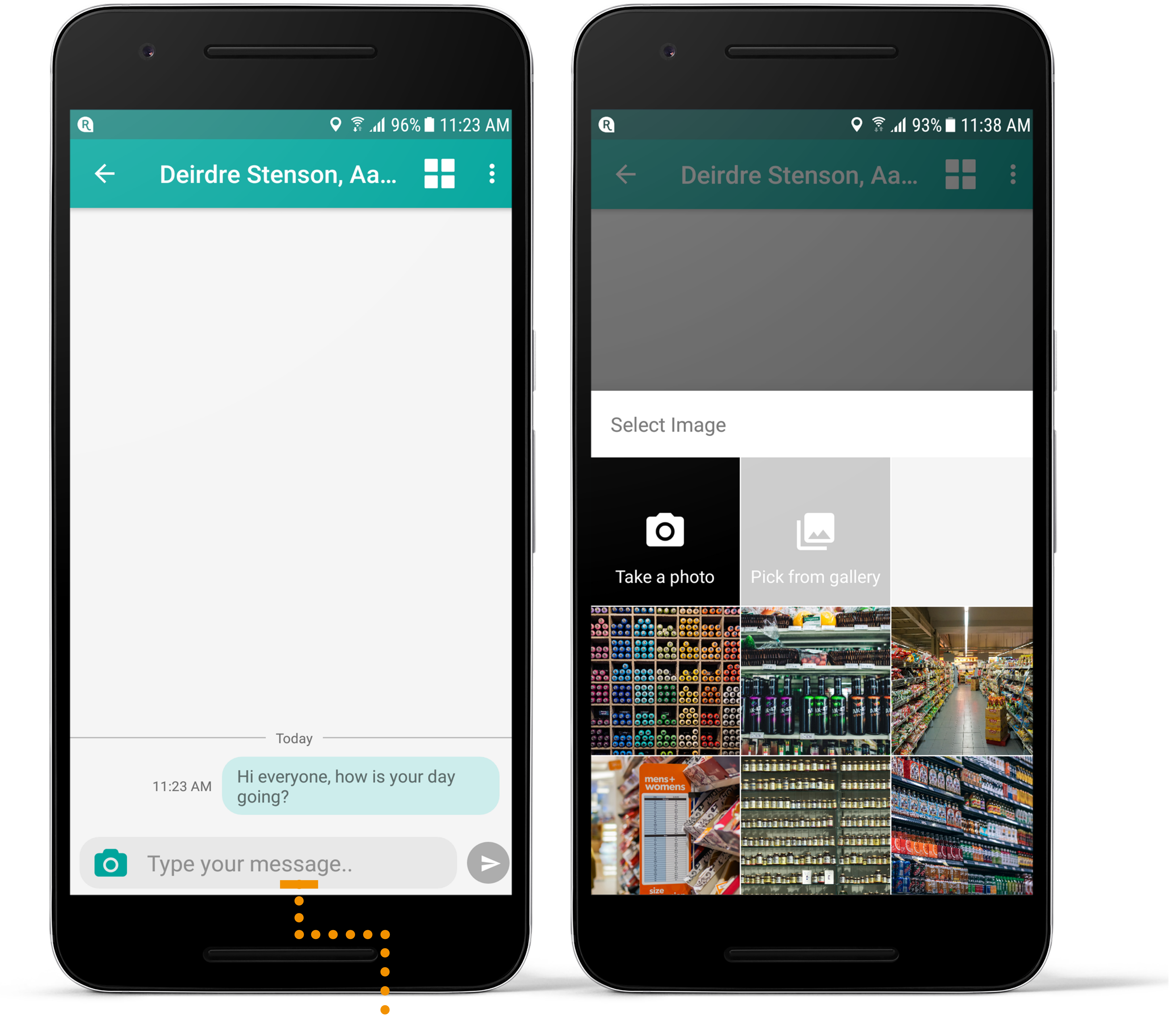
Managers can easily get information out to their entire team or coach individual teammates 1:1.



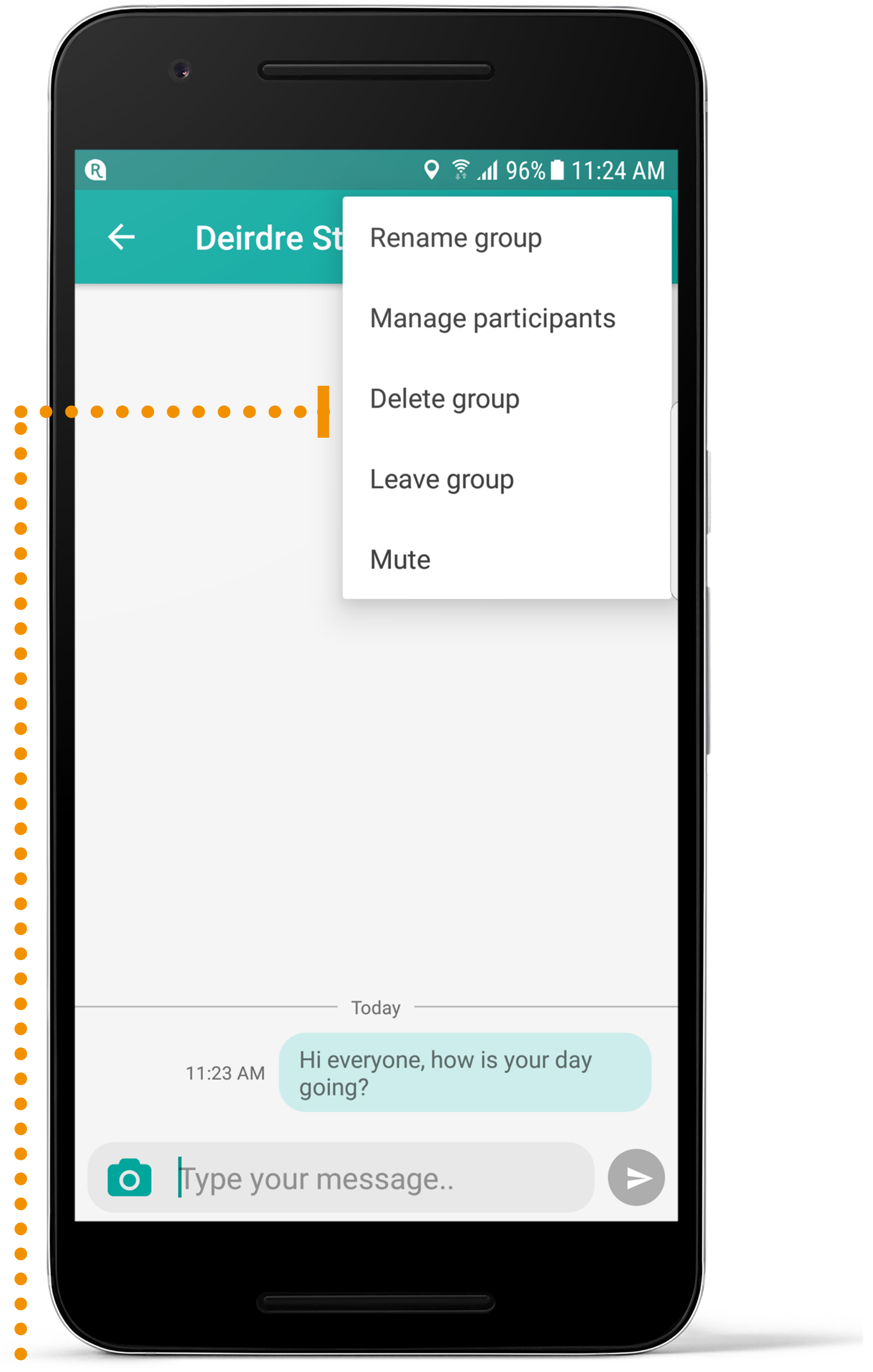
1 Find the Messaging module in your menu.



2 Create a new chat and select teammate(s).



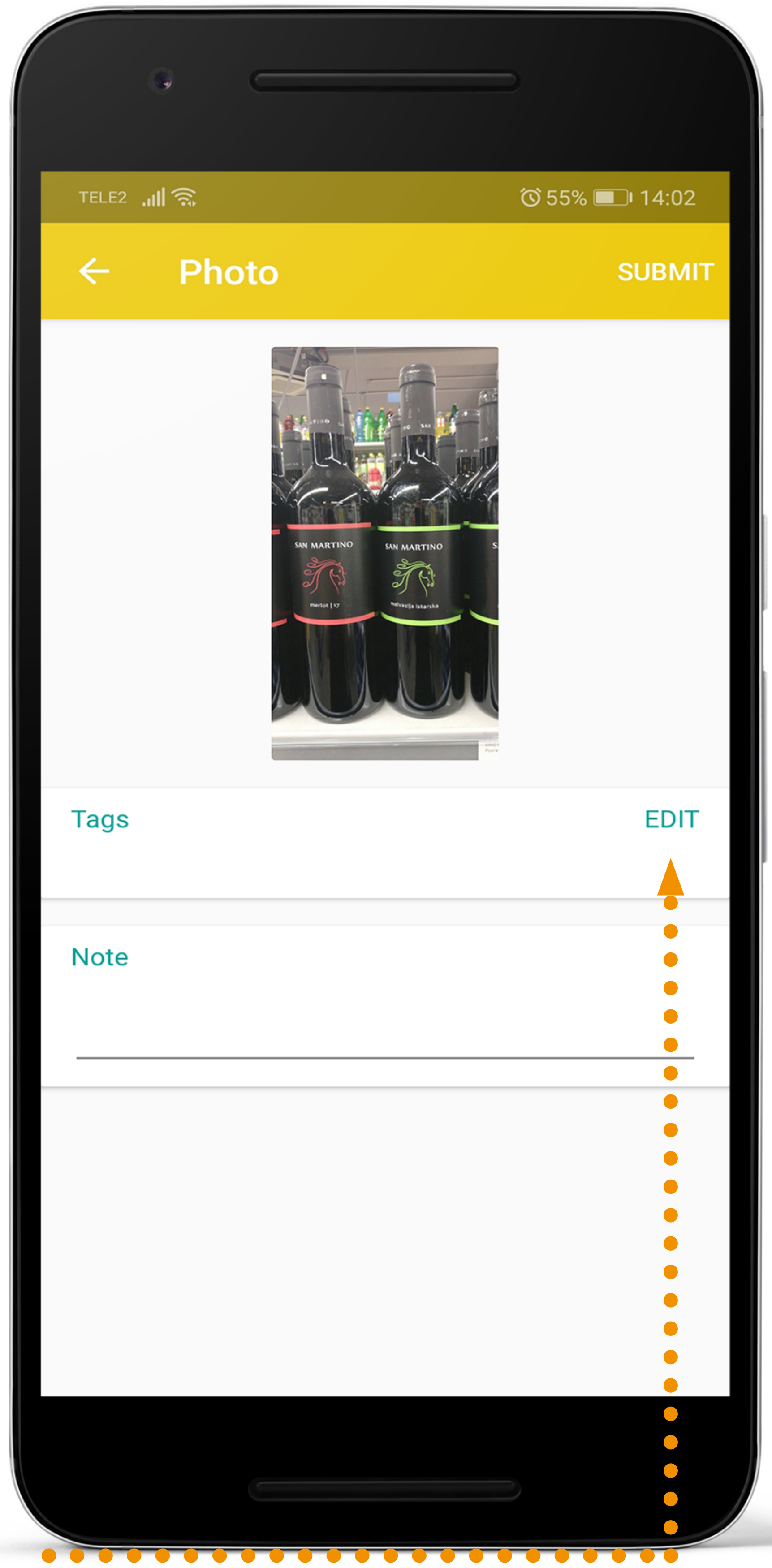
3 Type your **message** or **choose the camera**.

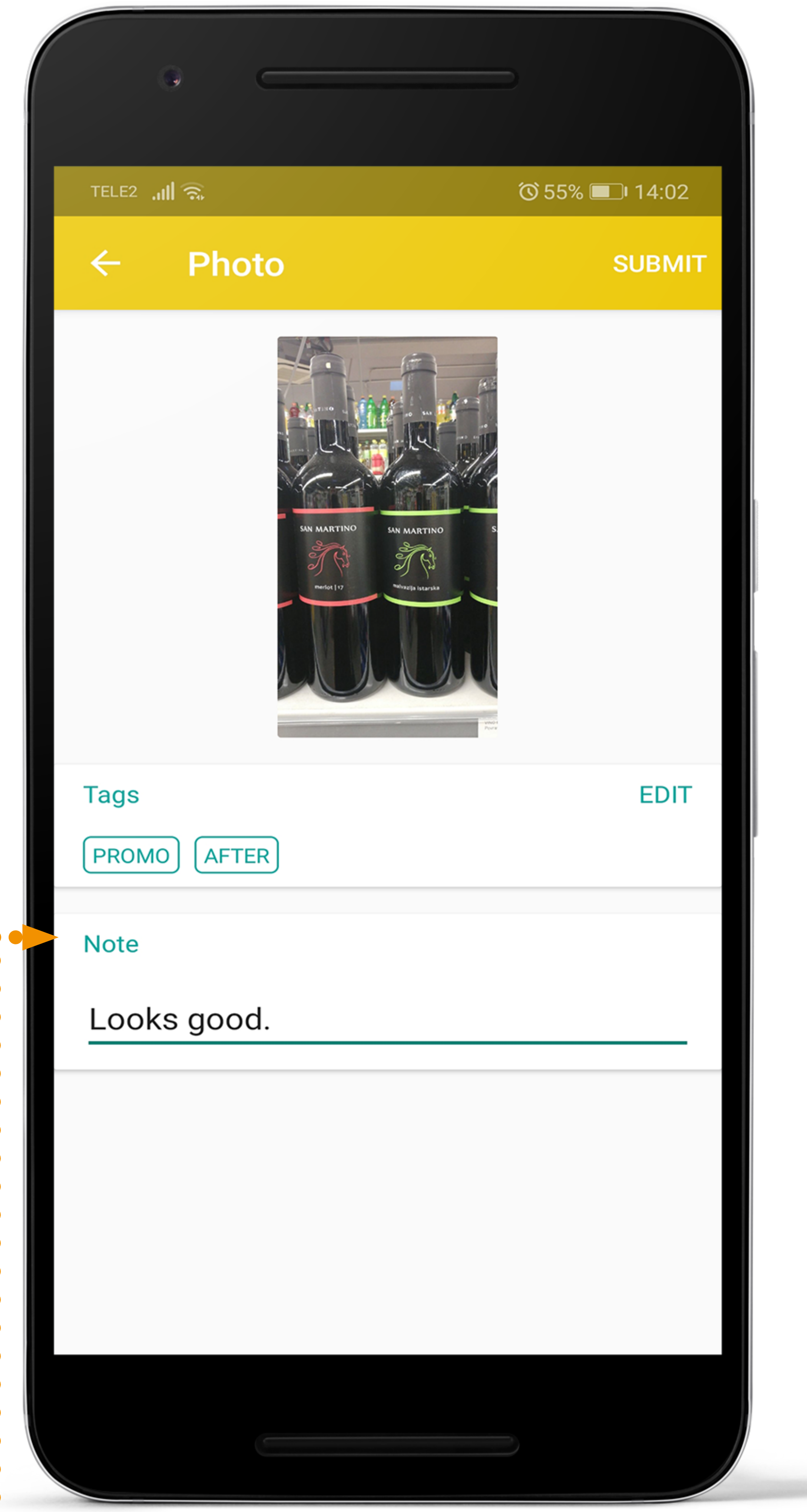


4 **Manage your group** with the top right menu.

HOW TO ADD OR EDIT PHOTO TAGS AND NOTES?

In the Repsly Mobile App, field representatives can edit photo tags and notes for photos even after these photos were taken and saved in Repsly.





1 Open the Photo for which you want to edit the Photo Tags and click on Edit.

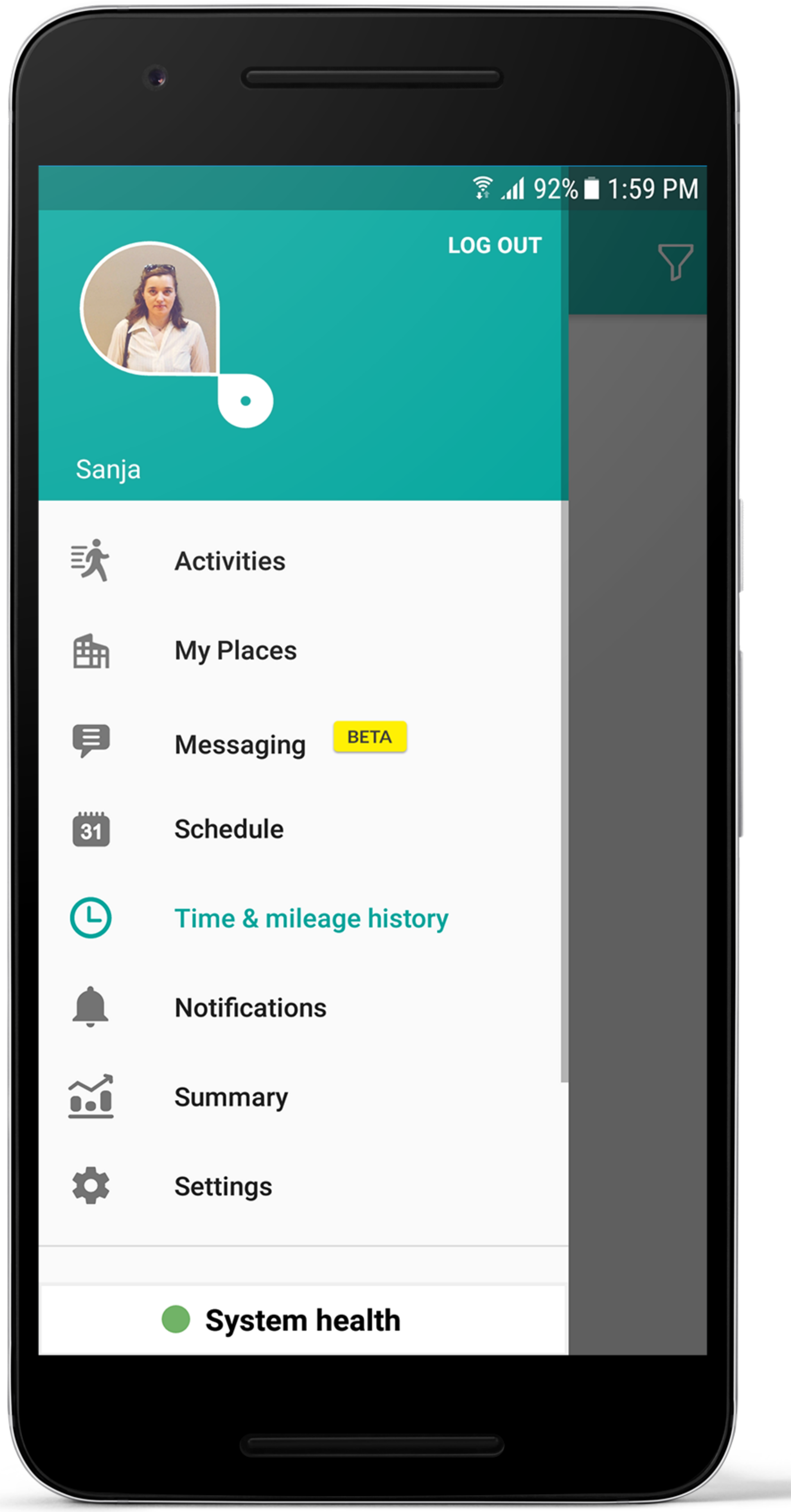
2 Click on Add to edit Photo Tags and choose the Tags you want from the menu. Confirm by clicking OK.

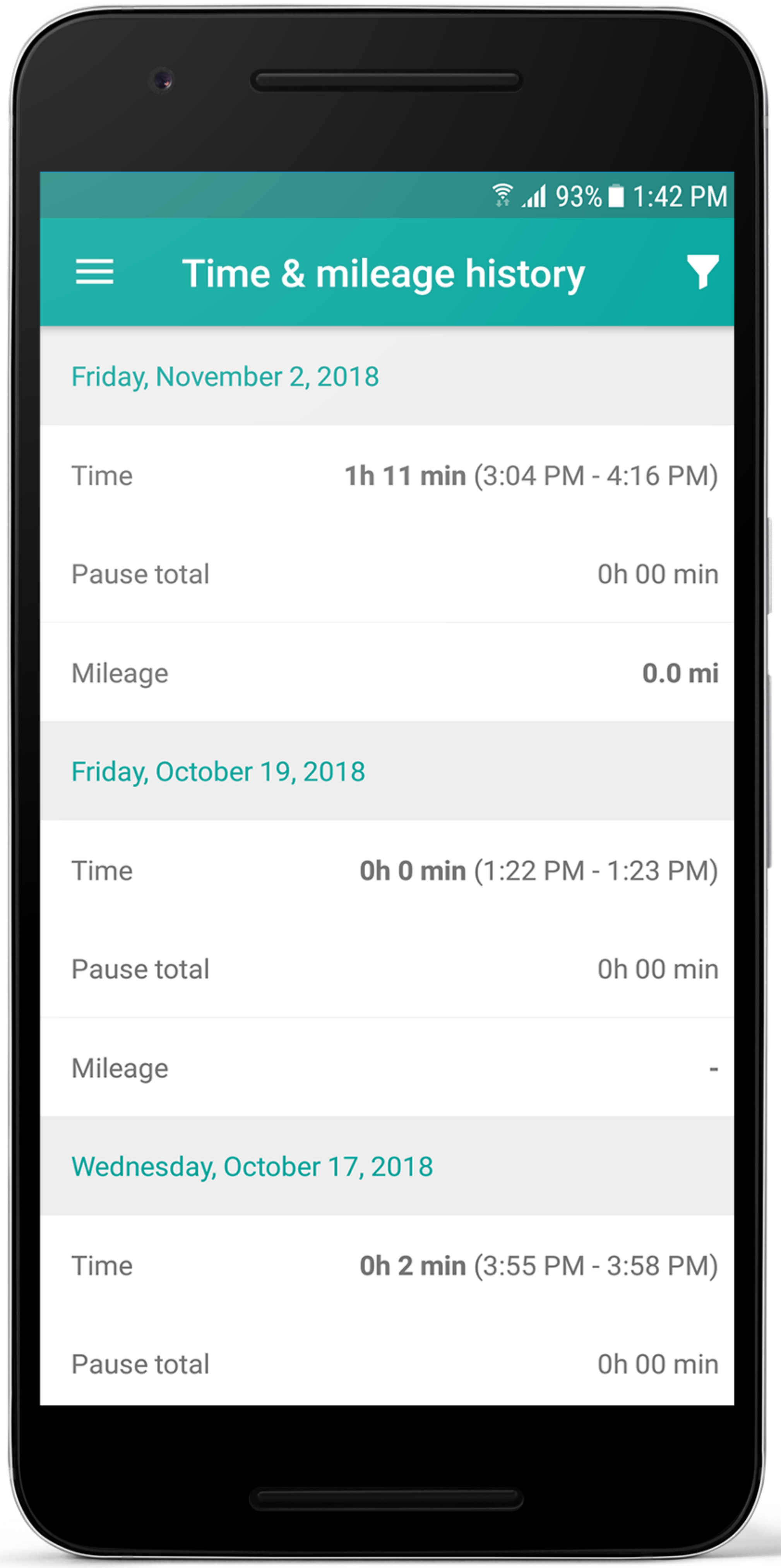
3 Now you will see the new Tags and you can optionally click on the Note to edit it as well. Confirm your changes by clicking Done.

HOW TO CHECK TIME & MILEAGE HISTORY?

Use the Time and Mileage screen to review all of your logged workdays and hours.

The functionality of this menu is closely connected to regular ‘Start’ and ‘End day’ routine.

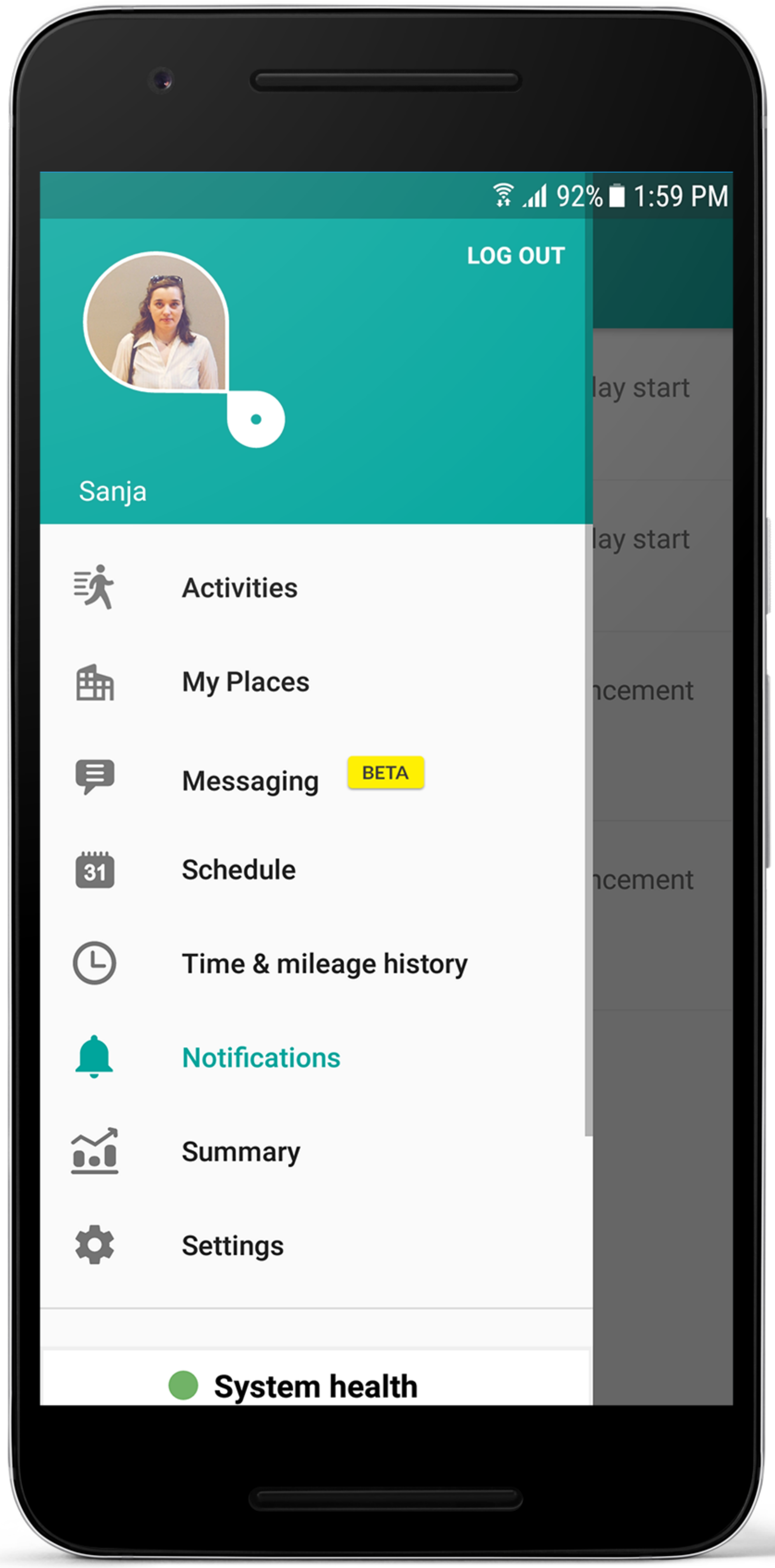


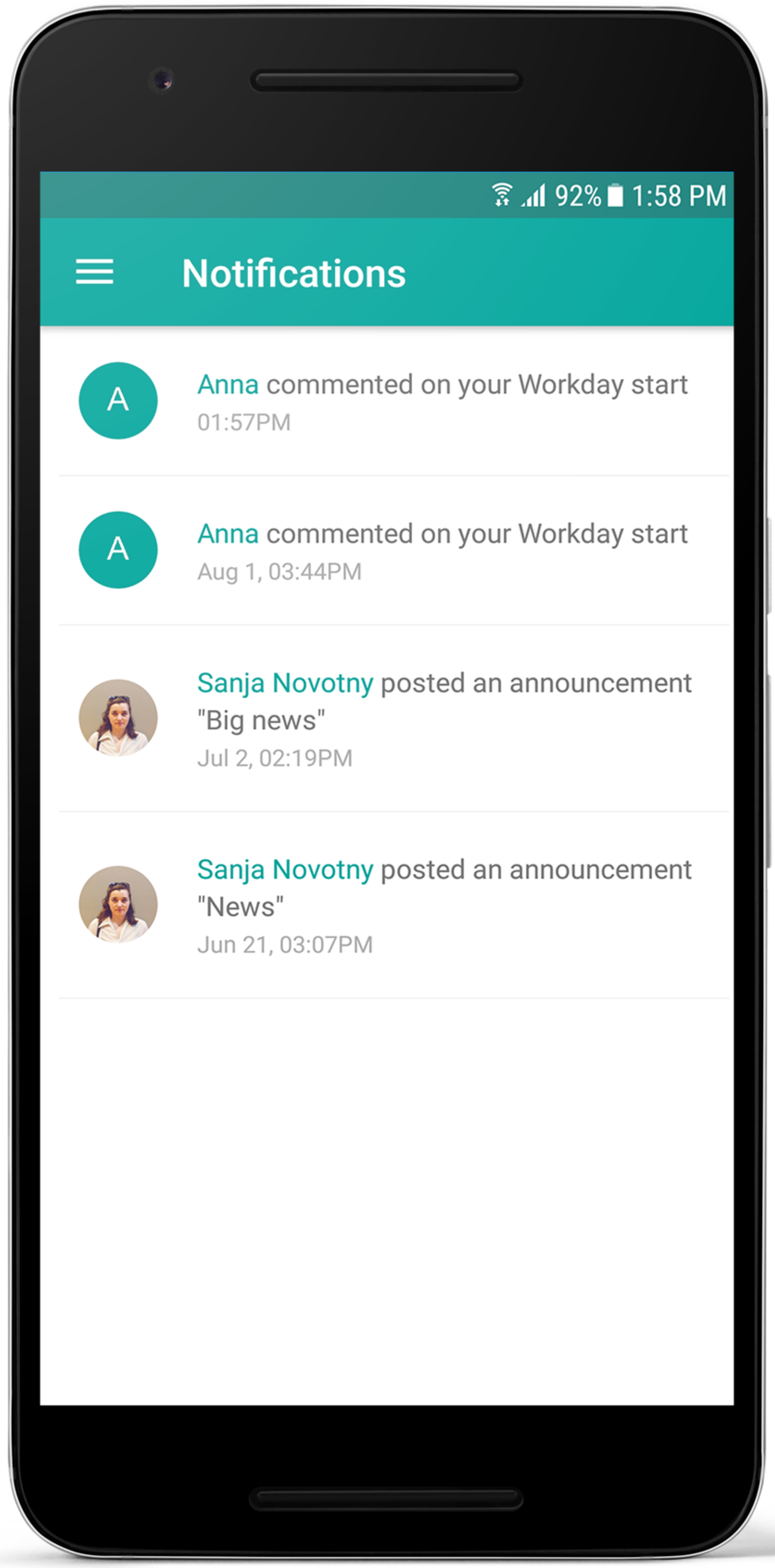


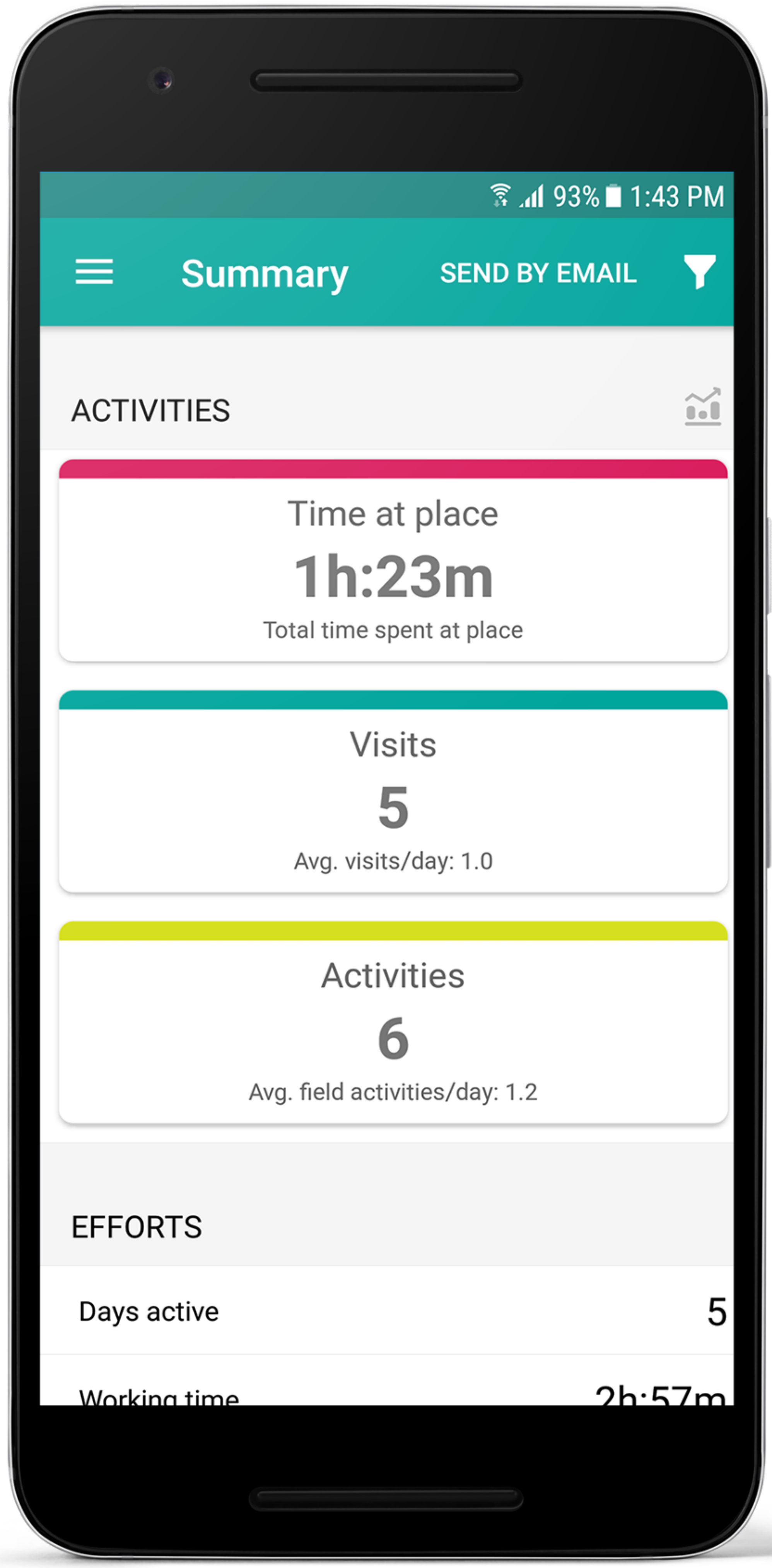
HOW TO USE NOTIFICATIONS?

Stay in the know with notifications. You will receive a notification any time another user comments on one of your activities or posts a team wide message!

To respond to a message simply click on it and reply.





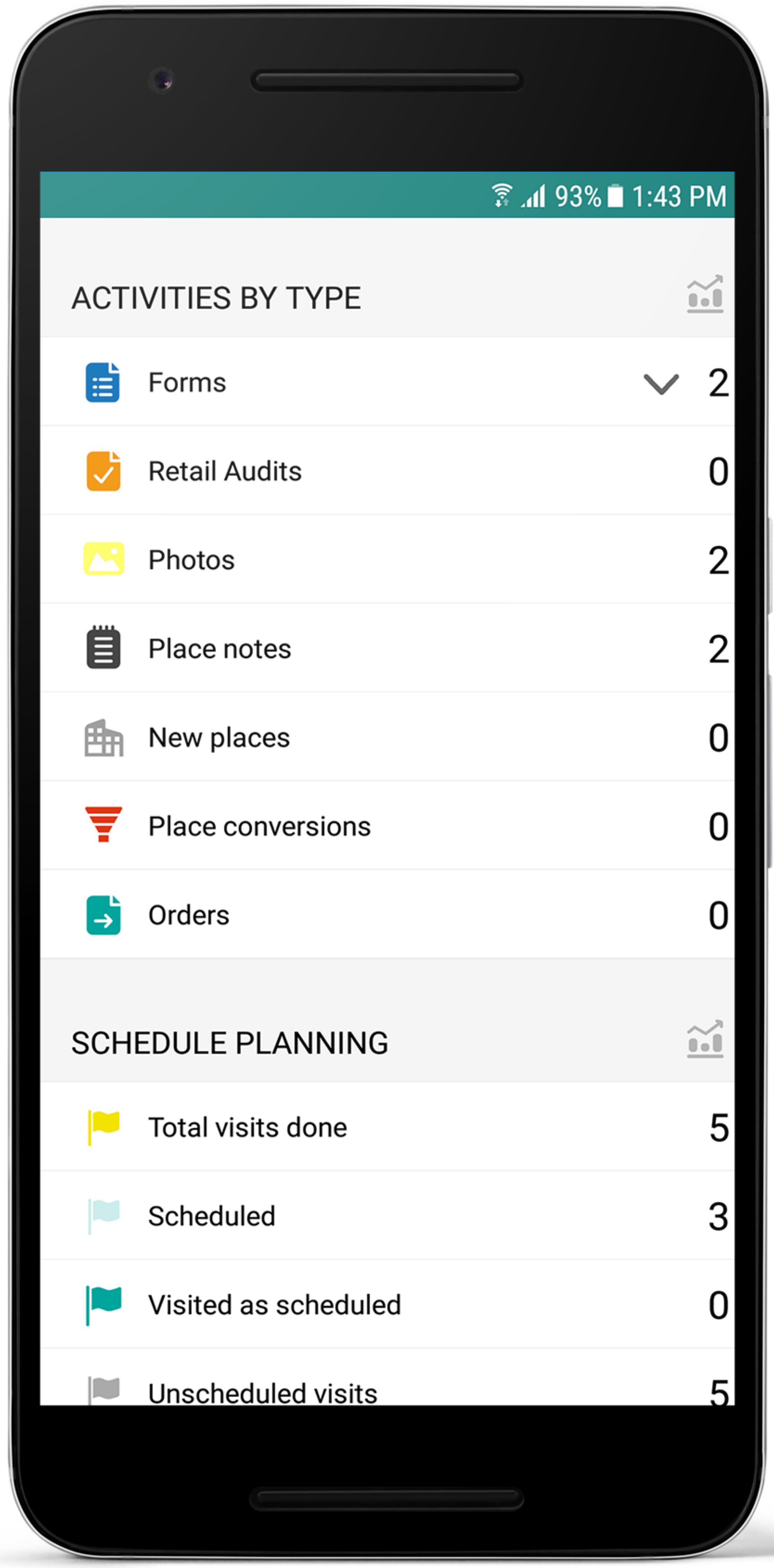


HOW TO VIEW A SUMMARY?

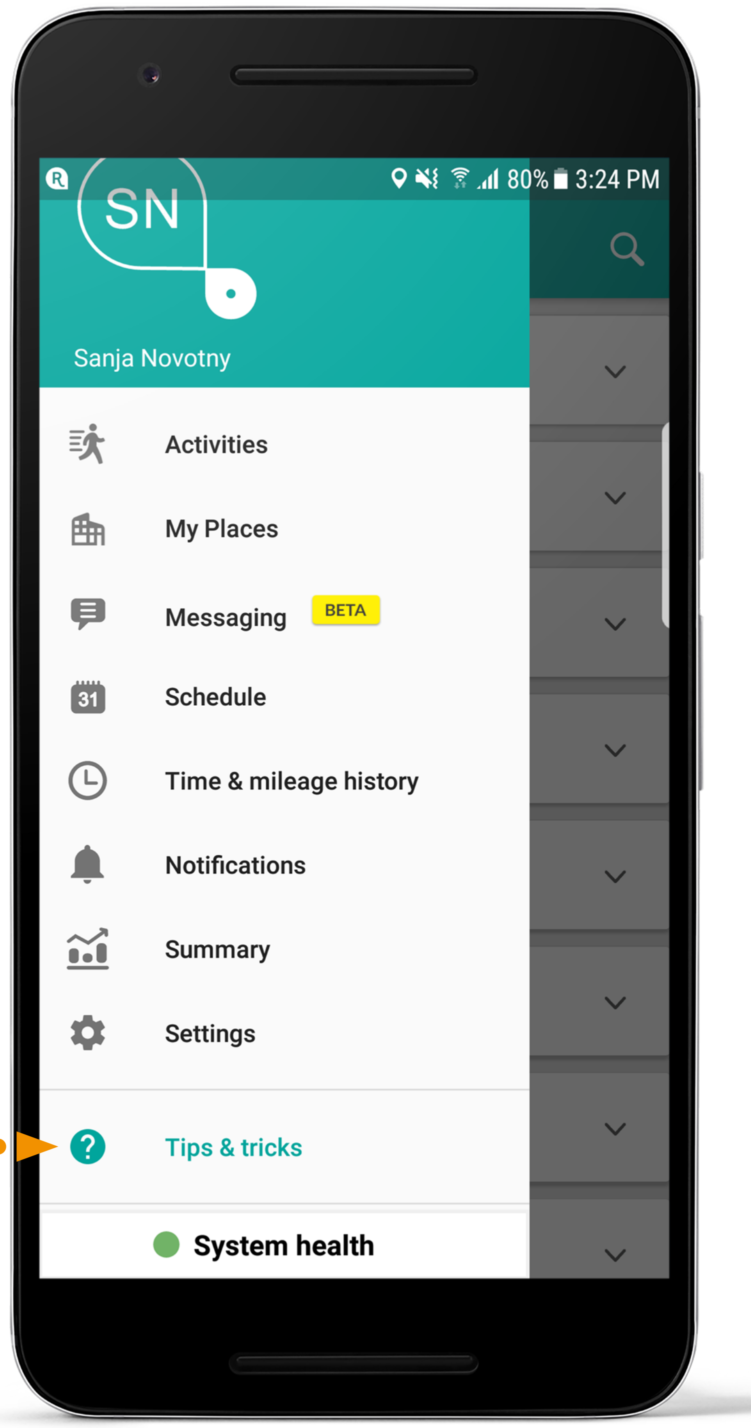
This screen allows you to get an overview of your performance. It can help you track your work and improve your results.

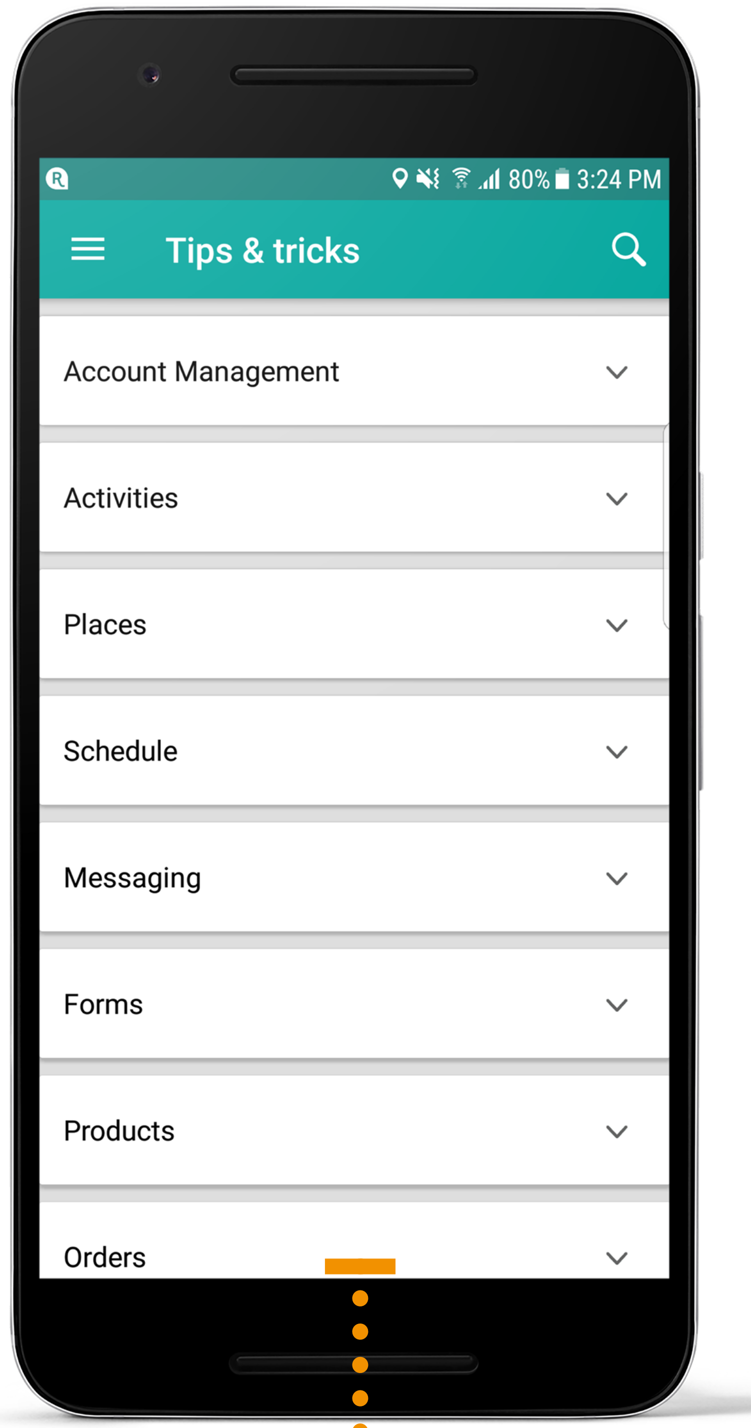
You can also email your latest performance to your manager.

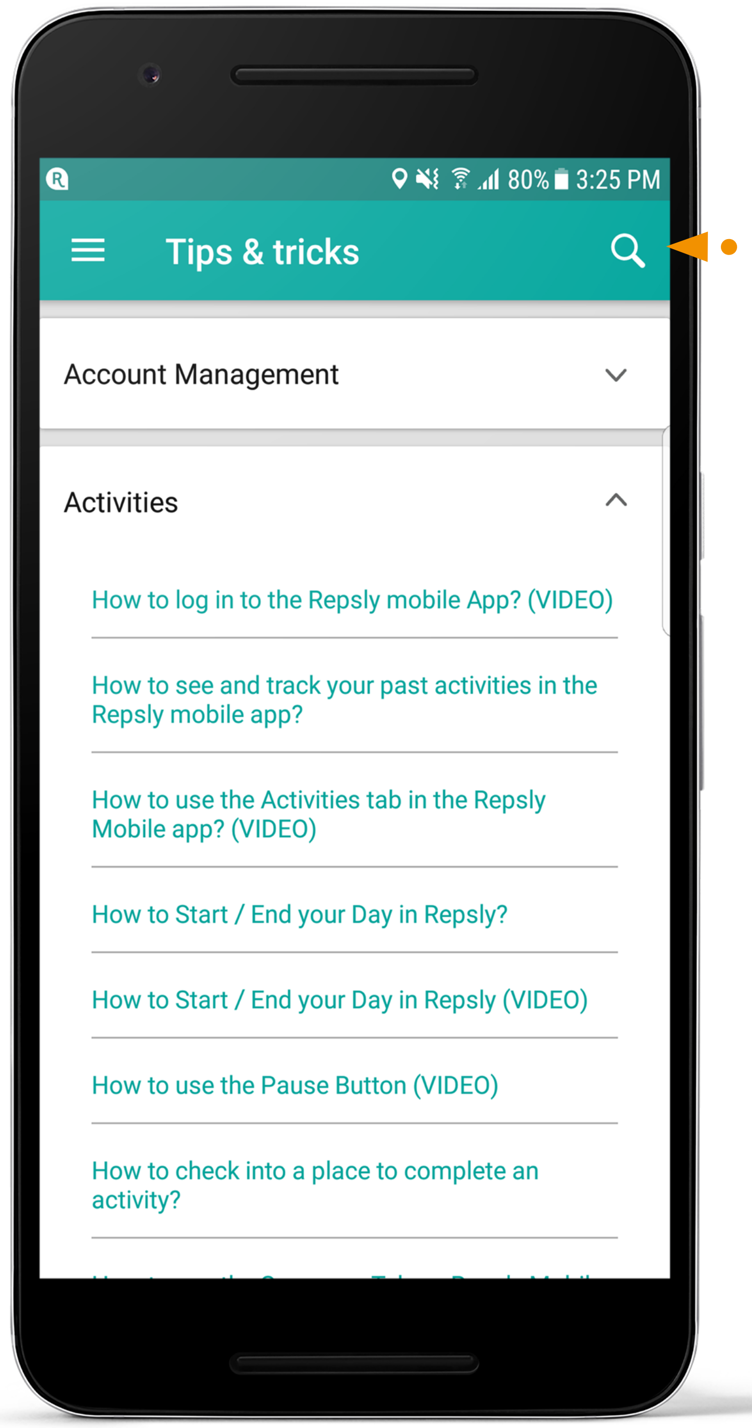
You can filter the report for any period of time worked.

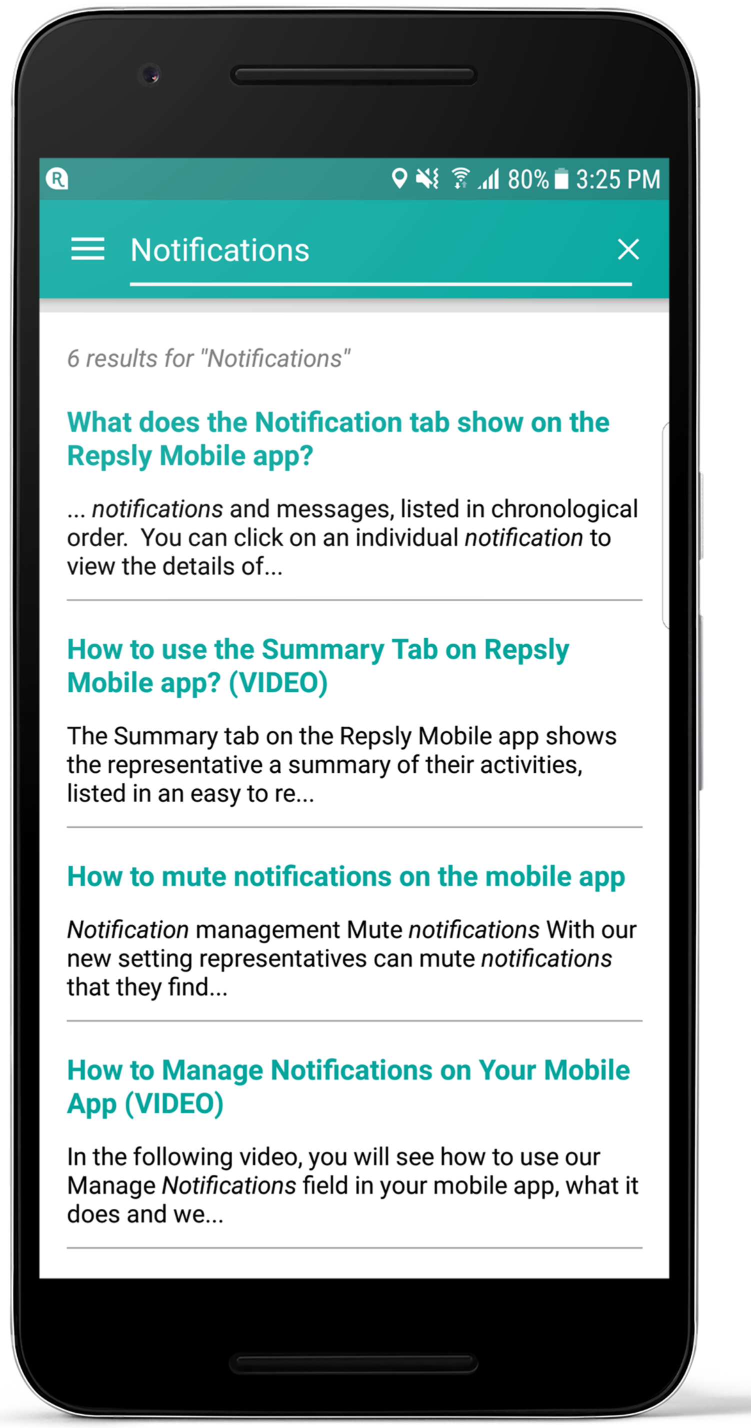


WHERE TO GET HELP IN APP?









1 Click on the **Tips&tricks tab**.

2 Choose a category.

3 Type in the search bar the keywords that address your question.

4 As an example, we typed in “Notifications” and all articles related to keyword are listed out.