



### REPRESENTATIVE TRAINING GUIDE

EDSUM

Mobile App





# **HOW TO INSTALL**

**Repsly Mobile Training Guide** 

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

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

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

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	Repsly.		
Email			
magdalena@i	repsly.com		<u>×</u>
Password			
	SIGN IN	I	
For	got password?   L	ogin via domain	

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### HOW TO INSTALL REPSLY ON iOS?

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

Press on the Get started

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

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<b>K</b> Back	Sign in	
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**HOW TO START** 🗊 📶 97% 🗖 11:19 AM YOUR DAY?  $\nabla$  $\equiv$ Activities SN What's on your mind? Repsly offers the ability to keep track of your working Friday, 9/28/18 hours and mileage. SN Sanja Novotny 3:10 PM - 3:13 PM Workday duration: 0:01 h | Pause: 1 min Mileage: 0.0 mi R Click on the Start Day 1 Comments (0) Button. 1:00 PM Alex Brussard AB **New Walgreens** 620 Washington Street, Boston, Massachu.. No activities Your day will start after 2 • clicking on **Start Day**. Alex Brussard START DAY Good morning! 

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## **HOW TO PAUSE**

After starting their day, field reps now have the option to

Please make sure to pause your day so we can

Click on the Pause sign.

Select OK at pop up window.

오 🛜 .₁1 94% 🖬 11:33 AM
$\equiv$ Activities $\heartsuit$
SN What's on your mind?
Sanja Novotny 11:26 AM 6min 😌
Pause Day
This will pause mileage counter until you resume your day.
Don't show this again
CANCEL OK
SN Sanja Novotny 11:19 AM -
Workday in progress
Comments (0)
Workday: 0:13 h 0.0 mi

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### In order to resume his workday, the rep must:

Tap the Play button in the Activities feed menu.

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



Activities           Image: Senia Novotny       11:26 AM 6min 9	🛇 🗊 .₁1 94% 🖬 11:33 AM	
SN What's on your mind?	ctivities	
Sania Novotny 11:26 AM 6min 9	t's on your mind?	
Whole Foods Huguenot Service Station 5270 Amboy Road, New York, New York 10	aja Novotny 11:26 AM 6min ♥ ole Foods Huguenot vice Station 70 Amboy Road, New York, New York 10 11:27 AM : Promotion Report ■ 0	
SN Sanja Novotny 11:19 AM -	nja Novotny 11:19 AM - •	
<ul> <li>Workday in progress</li> <li>Comments (0)</li> </ul>	rkday in progress Comments (0)	
/orkday: PAUSED	AUSED	



R <ul> <li></li></ul>	HOW' YOUR
SN What's on your mind?   Sanja Novotny   11:26 AM 6min    Whole Foods Huguenot Service Station   270 Amboy Road, New York, New York 10     Image: Comparison of the service state of the service state of the service s	*Once you end you 1 Click t botton
<ul> <li>SN Sanja Novotny</li> <li>Workday in progress</li> <li>Comments (0)</li> <li>Workday: 0:18 h 0.0 mi</li> </ul>	2 Click I now b

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### TO END DAY?

ır day, you cannot restart it.

the Stop button in the n right corner.

End Day. Your day has een ended.



### **HOW TO** CHANGE YOUR **PASSWORD?**

Passwords can be changed on the mobile app.

This is a setting inside your account.



ⓒ 78% 💌 11:05	<ul> <li>الله الله الله الله الله الله الله الله</li></ul>	
	Forgot your Password? Enter your email below to reset your password Company ID	Enter your company ID and the e-mail address associated with your account.
domain	SUBMIT	Click on Submit and you will be forwarded to enter your new password and confirm it.





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).

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

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

# **OPTIMIZE MY**





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**10** Repsly Mobile Training Guide

With permission, reps are allowed to create and manage

This allows them to proactively manage their day from

Click on the My Places tab.

Select the place you wish to schedule a visit for.

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$\equiv$ whole $\times$ $\heartsuit$	
Whole Foods 51 Austin Street, Cambridge, Ma 02129, US	>10mi
Whole Foods Cambridge 181 Cambridge Street, Cambridge, Ma 02114, US	>10mi
Whole Food South End 745 Atlantic Avenue, Boston, Massachusetts 021	. >10mi
Whole Foods Harrison 310 Harrison Avenue, Boston, Massachusetts 02	>10mi
Whole Foods Southie Old Colony Avenue 333, Boston, Massachusetts 0.	.>10mi
Whole Foods 45 Beacon Street, Boston, Ma 02143, US	>10mi
Whole Foods 115 Prospect Street, Boston, Ma 02139, US	>10mi
Whole Foods 880 Main Street, Boston, Ma 02176, US Stickler for merchandisers	+ <sup>1i</sup>

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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.

2

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



Open the My Places tab.

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ি না 97%∎ 1 ≡ My Places Q ♥	12:24 PM
SEPHORA Braintree, Massachusetts 02184, United States	>10mi
Shaw's/ Star Market 641 Belmont St, Boston, MA 02301, US	>10mi
Shaw's/ Star Market 760 A Boston Rd, Cambridge, MA 01450, US	>10mi
Shaw's/ Star Market 14 W Boylston St, Waltham, MA 01605, US	>10mi
CVS 36 WHITE STREET, Boston, MA 02140, US	>10mi
Whole Foods 331 Paradise Road, Boston, Ma 01907, US	>10mi
Shaw's/ Star Market 100 North Main St, Waltham, MA 02330, US	>10mi
Waltham Grocers 1800 Lexington Street, Waltham, MA 02452, US	+ i







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 ADDA 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.



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<b>49 Social</b> 49 Temple Place, Boston, M	lassachusetts 02111, United S
7-Eleven 673 East Broadway, Boston	, Massachusetts 02127, Unite
ACME Markets 800 West Avenue, Ocean Ci flynnconnor0@gmail.com	ty, New Jersey 08226, United
Amigos Grocery Store 86 Broadway, Somerville, M	assachusetts 02145, United S
Beer Distributors of Ma 45 School Street, Boston, M	assachusetts Inc assachusetts 02108, United S
Borczuk Pierre MD 38 Emerson Street, Boston,	Massachusetts 02127, Unite
Brewer Yacht Sales at 333 Victory Road, Quincy, N	Quincy lassachusetts 02171, United
Bruegger's Bagels and 496 Main Street, Melrose, M	Jamba Juice Massachusetts 02176
BYOD dog wash 208 Sumner Street Newton	Massachusetts 02459

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





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**.

### **15** Repsly Mobile Training Guide



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**.

3

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



this place to your place's list.

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



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>10mi

### 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.

1

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



TELE2 46	CLEAR FILTER	DONE
SN	TERRITORY	
SN	All All (North)	
	<ul> <li>(New England)</li> <li>(Providence)</li> </ul>	
JM	<ul> <li>(Mid-Atlantic)</li> <li>(New York)</li> <li>(Northern New Jersey)</li> </ul>	
Stor	(Southern New Jersey) (Washington D.C.) Marketing Team	
Gath	REPRESENTATIVES	
JM	My team	
G	PERIOD	



2

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

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



## **HOW TO FILTER**

### Press on the Places tab.



9



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?





Click on the Activities tab.



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







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.



### **20** Repsly Mobile Training Guide

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### **HOW TO FILL OUTAFORM?**

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

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

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$\equiv$ My Places	Q	$\nabla$	
True Value Home Hardwa 16 Railroad Street, Simsbury, Co	are & Garden onnecticut 060	70, <sup>&gt;</sup>	•10mi
Cirillo's Market IGA 511 Montauk Hwy, Amagansett	t, NY 11930, Ur	nited <sup>&gt;</sup>	·10mi
East Hampton Wines & Li 293 Springs Fireplace Rd, East	i <mark>quors</mark> Hampton, NY 1	19 <sup>&gt;</sup>	·10mi
Moxie 52 Wall St, Madison, CT 06443,	United States	>	•10mi
Stony Creek Brewery 5 Indian Neck Ave, Branford, CT	Г 06405, Unitec	l St >	•10mi
Harlan Social 121 Towne Street, Stamford, Co	onnecticut 069	02, <sup>&gt;</sup>	•10mi
Whole Foods Huguenot S 5270 Amboy Road, New York, N	Service Station	<mark>on</mark> 2, U <sup>&gt;</sup>	·10mi
Hanley's Resort 31 Colon Street, New York, New	v York 10312, l	Jni <sup>,</sup>	Pmi
Bed Bath & Beyond	Work Now Yo		•10mi

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



### **21** Repsly Mobile Training Guide









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 TAKEA PHOTO?**

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



4



click on the **Photo option**.

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.





**23** Repsly Mobile Training Guide

# **DELETE A PHOTO?**

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

> Open the photo you want to delete and click on the delete button in the bottom right

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.





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**.



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÷	SUMMARY	3 ITEMS	1:3 ∎ 94% ∎ 1:3 SUBMIT	8 PM
ORDER Whol 331 Para	<b>e Foods</b> adise Road, Bosto	on, Ma 0190	7, US	
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Disco	ount rate %			0
Disco	ount amoun	t	0.0	00
ТАХ				
\$ 468	. <mark>00</mark> / 2 items			

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** MAKEA 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.



you want to take a note. After check in, click on the Note button.

the right corner.

### **HOW TO** FILL OUT ARETAIL AUDIT?

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





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



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RUBY RED SELTZER 34	
Available	
Promoted	
Price	4.39
Stock Level	15
NOTE	
Is this Refrigerated?	
YES NO	$\otimes$
Ruby Red Seltzer	

Complete the necessary fields and 2 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.



**27** Repsly Mobile Training Guide

# HOW TO PLACE

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

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

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





number, and the due date for the order

in this section if applicable.

TELE2 46\*.... ഀൕ40% 💷 ෦ 14:23 Order **CVS Pharmacy** 55 Summer Street, Boston, Massachusetts 02110, Unit Note Order Are you sure you want to submit this document? SUBMIT SUBMIT AND SEND BY EMAIL CANCEL **DISCOUNT & TAXES** TAGS Edit 1 item / Qt 12 30,00 USD DONE

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.



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← All	prod Q 🛄 🏟	$\nabla$
	<b>Asahi, Super Dry</b> 9780201379143	+
	12oz bottle. Dry hopping gives As	-
BEYOND MAAT DYURCOUR HUBBER AND BURBER AND B	Beyond Meat, Beyond Burger 9780201379051	+
	2 pack, 4oz patties. 20g of plant-b Hint Water, Watermelon	_
	9780201379044 Watermelon Hint Water is a comb	+
	KIND Bars, Peanut Butter Dark Chocolate 9780201379037	+
	Kraft, Original Macaroni & Cheese Dinner 9780201379020 No artificial flavors, dyes, or prese	+
	Vita Coco, Organic Coconut Water 9780201379013	+
→ 1 items ↓ 24	; / Qt	NEXT

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.





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



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

	• –			
TEL	.E2 <sup>46*</sup> 11		ੰ© 40% ▣ 14:24	
<i>~</i>	Return			
<b>C</b> \ 55	<b>/S Pharmacy</b> Summer Street	t, Boston, Massac	husetts 02110, Ui	nit
N	lote			
	Return			
	Are you sur document?	e you want to si	ubmit this	
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	s	SUBMIT AND SENI	D BY EMAIL	ľ
			CANCEL	
ТАС	GS		Edit	
	л			
	1 items / Qt □24	t	DONE	

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

6

### **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.





the **Red Icon** and click on the More button.

perform.

TELE2 46 .... 🕄 🚱 🕲 27% 💷 I 5:32 Search produ 💦 🖓 NEXT 🚦 Vita Coco, Organic Coconut Water Available 🗸 Promoted 🗸 0,00 USD Kraft, Original Macaroni & Cheese Dinner Available 🗸 Promoted 🗸 0,00 USD Hint Water, Watermelon Available 🗸 Promoted 🗸 0,00 USD **Beyond Meat, Beyond Burger** Available  $\checkmark$  Promoted  $\checkmark$  0,00 USD 0 / 4 items checked

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.



### Repsly Mobile Training Guide





### **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.





Tags and click on Edit.



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Confirm by clicking OK.

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.



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≡ Time & r	اس 93% ∎ 1:42 PM mileage history
Friday, November 2, 2	2018
Time	<b>1h 11 min</b> (3:04 PM - 4:16 PM)
Pause total	0h 00 min
Mileage	0.0 mi
Friday, October 19, 20	018
Time	<b>0h 0 min</b> (1:22 PM - 1:23 PM)
Pause total	0h 00 min
Mileage	-
Wednesday, October	17, 2018
Time	<b>0h 2 min</b> (3:55 PM - 3:58 PM)
Pause total	0h 00 min

### 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.

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ACT	VITIES BY TYPE	
	Forms	√ 2
-	Retail Audits	0
	Photos	2
Ö	Place notes	2
	New places	0
Ŧ	Place conversions	0
→	Orders	0
SCH	EDULE PLANNING	
	Total visits done	5
	Scheduled	3
	Visited as scheduled	0
	Unscheduled visits	5

### WHERE TO GET HELP IN APP?



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





Choose a category.





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





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