

ANDROID



Training Guide

REPRESENTATIVES

ANDROID VERSION



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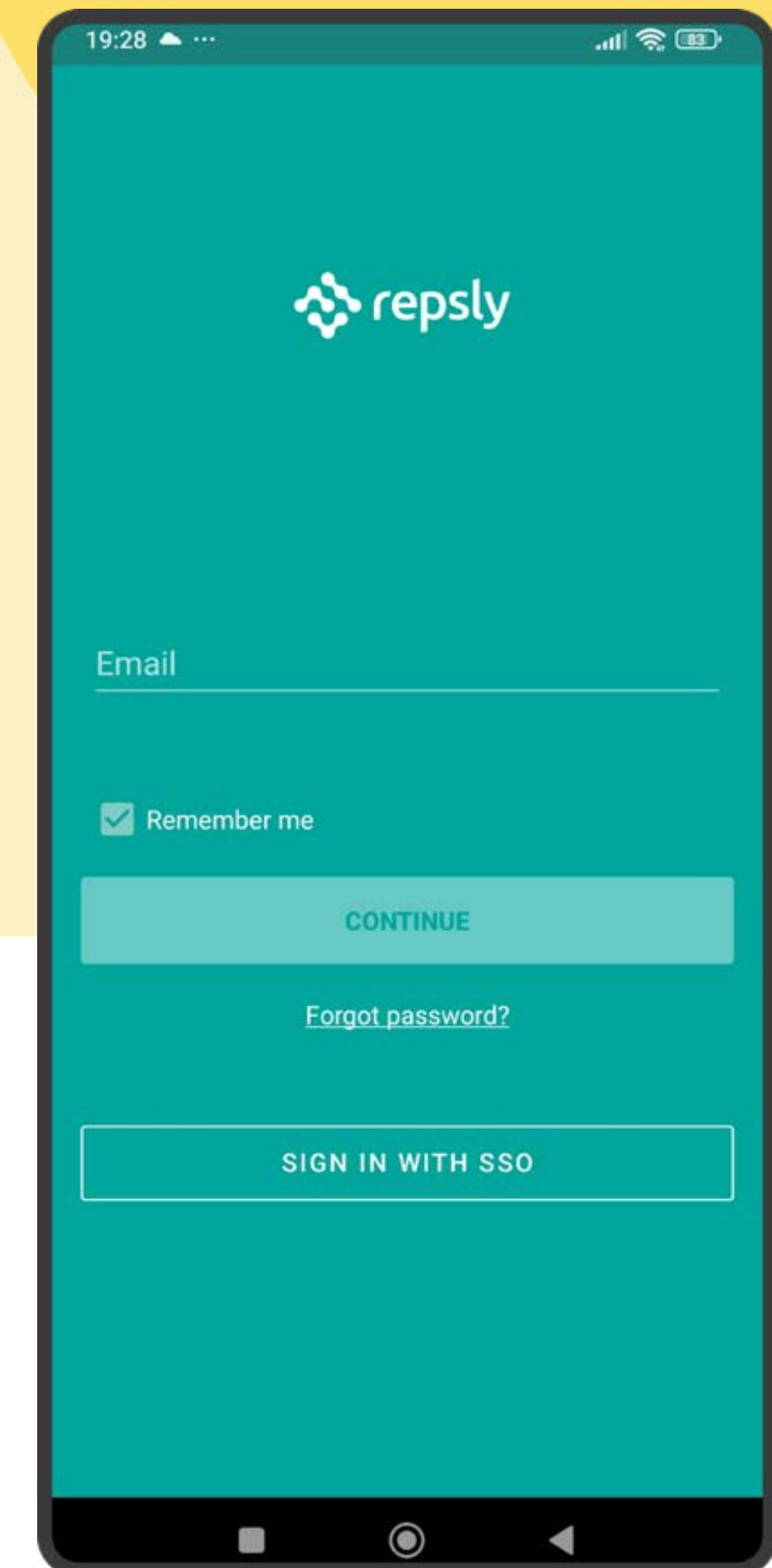
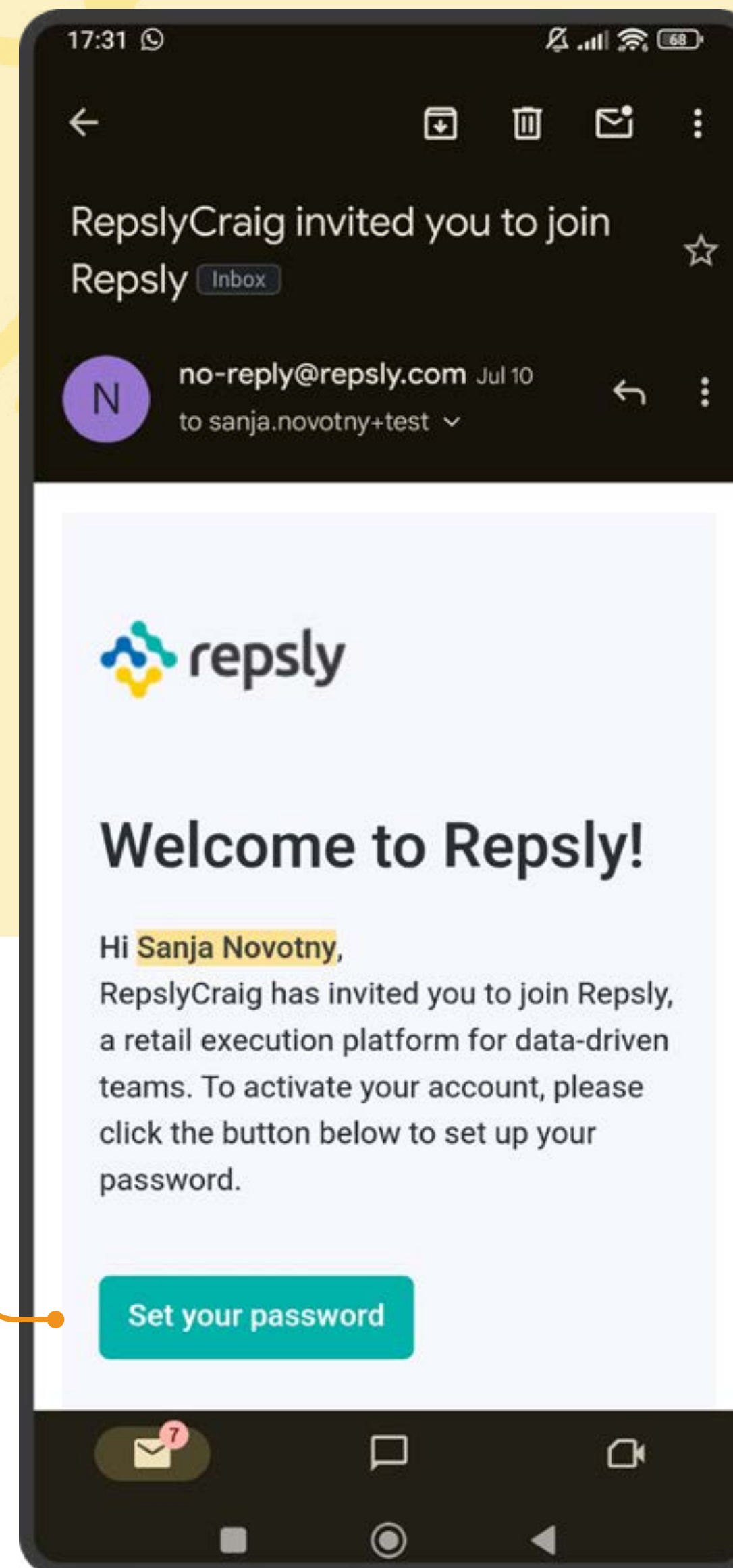
01

HOW TO INSTALL REPSLY ON ANDROID

Welcome to Repsly! New representatives will receive an e-mail with a link to install the Repsly app on their mobile device. Once you download the app you will be prompted to set your password and log in.

NOTE: Please ensure you open the Repsly email on the device you intend to use for Repsly.

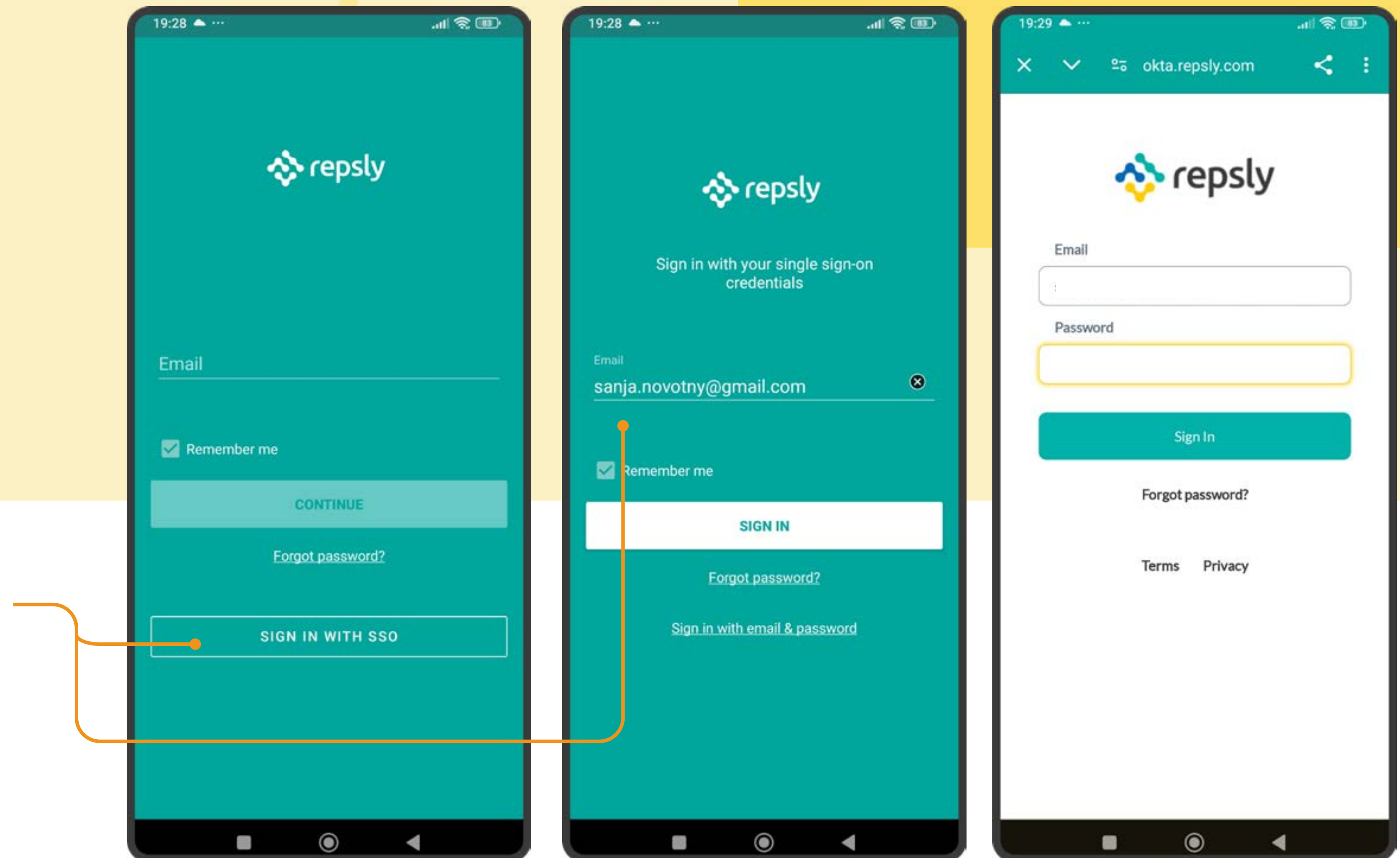
- 1 Once you've been added as a Rep, you'll receive an email. Click on the **SET YOUR PASSWORD**.
- 2 Press on the **GET STARTED** button. After you fill in credentials to login, click on **SIGN IN**.



HOW TO SIGN IN TO REPSLY WITH SSO

If you're using Single Sign-On (SSO) to log in, you can now access the Repsly mobile app with just your email and password.

- 1 Scroll down on the login screen and select **SIGN IN WITH SSO**. On next step type in your email address.
- 2 On last step, you need to enter your email address and password.



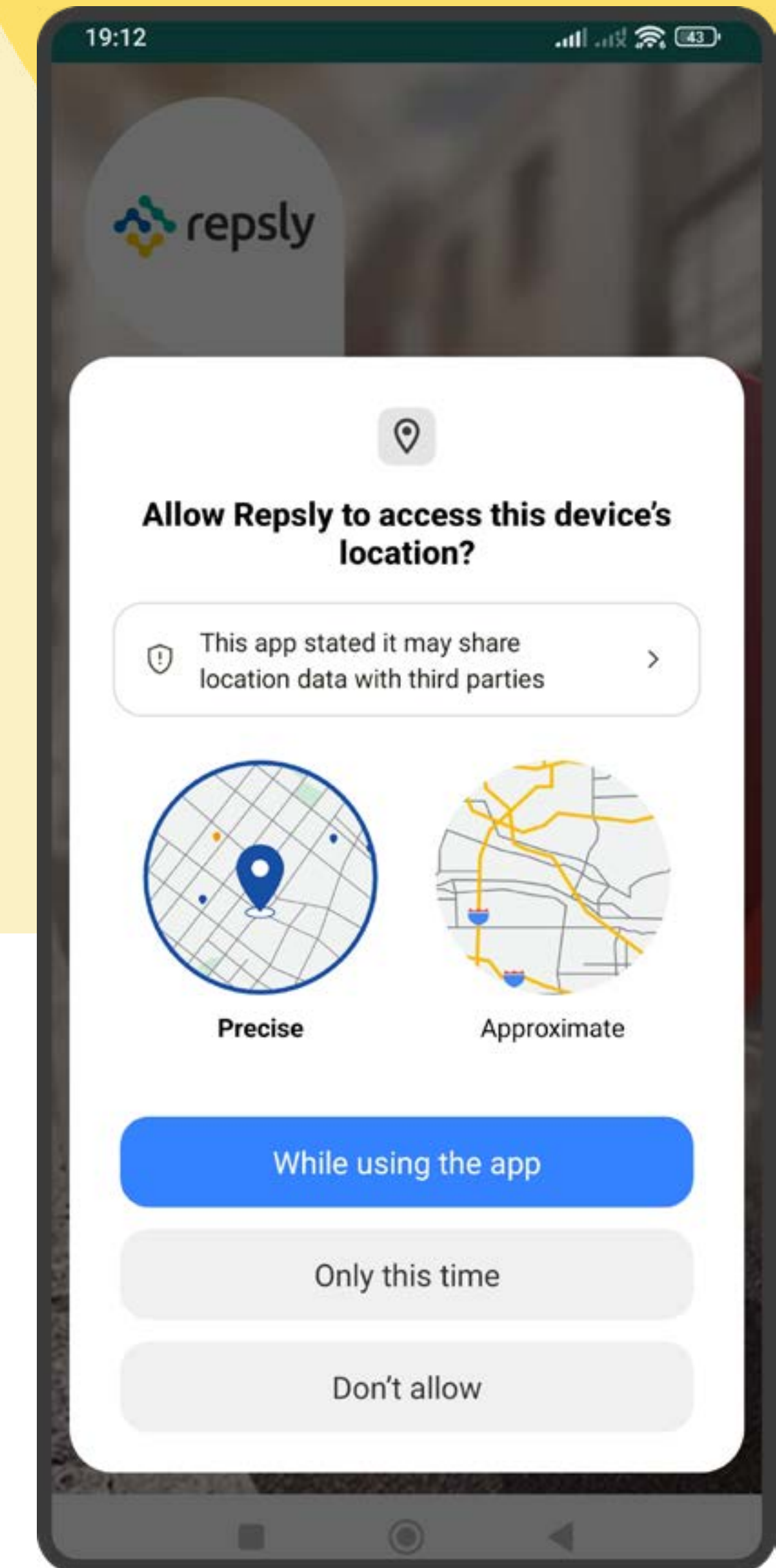
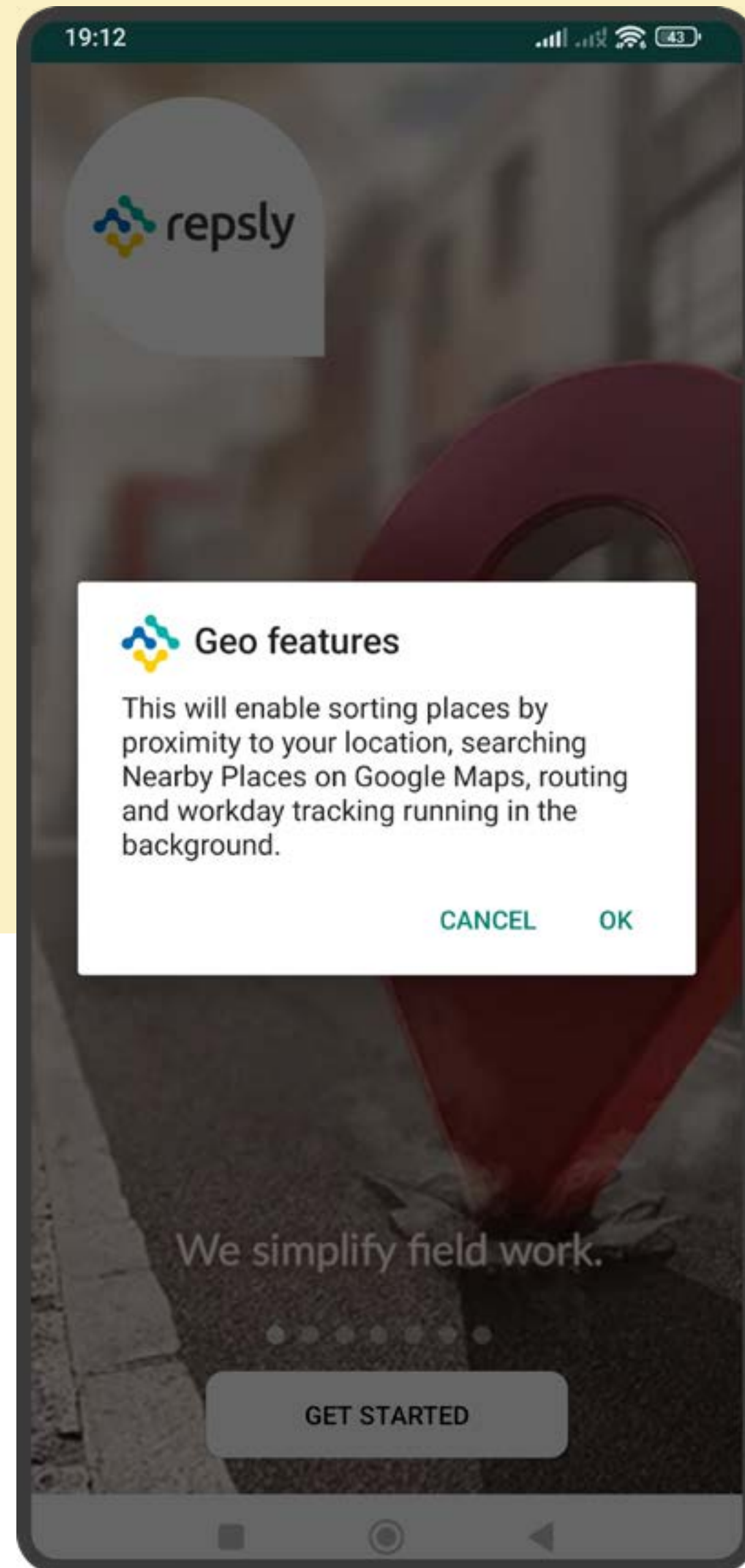
02

HOW TO TURN ON LOCATION SERVICES

To ensure the Repsly app can effectively assist you in managing your time and mileage, it's essential to enable location services on your device. This allows the app to access your accurate location, which is crucial for various features that support your work.

- 1 If you're new to Repsly and just starting to use our app, you'll see the screen below the first time you log in. Simply click **OK** to proceed.

Click on **PRECISE** and use **2 WHILE USING THE APP.**



03

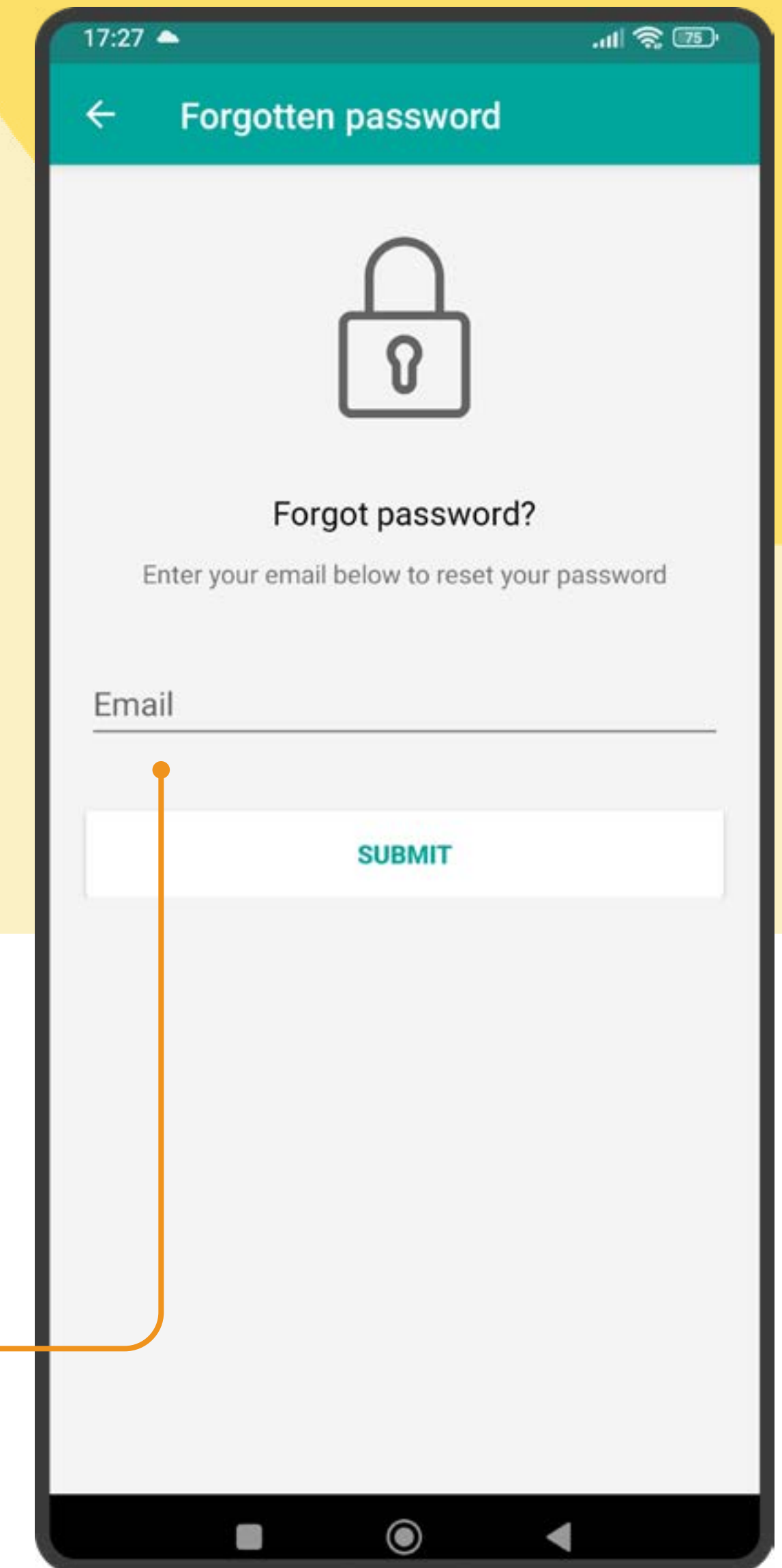
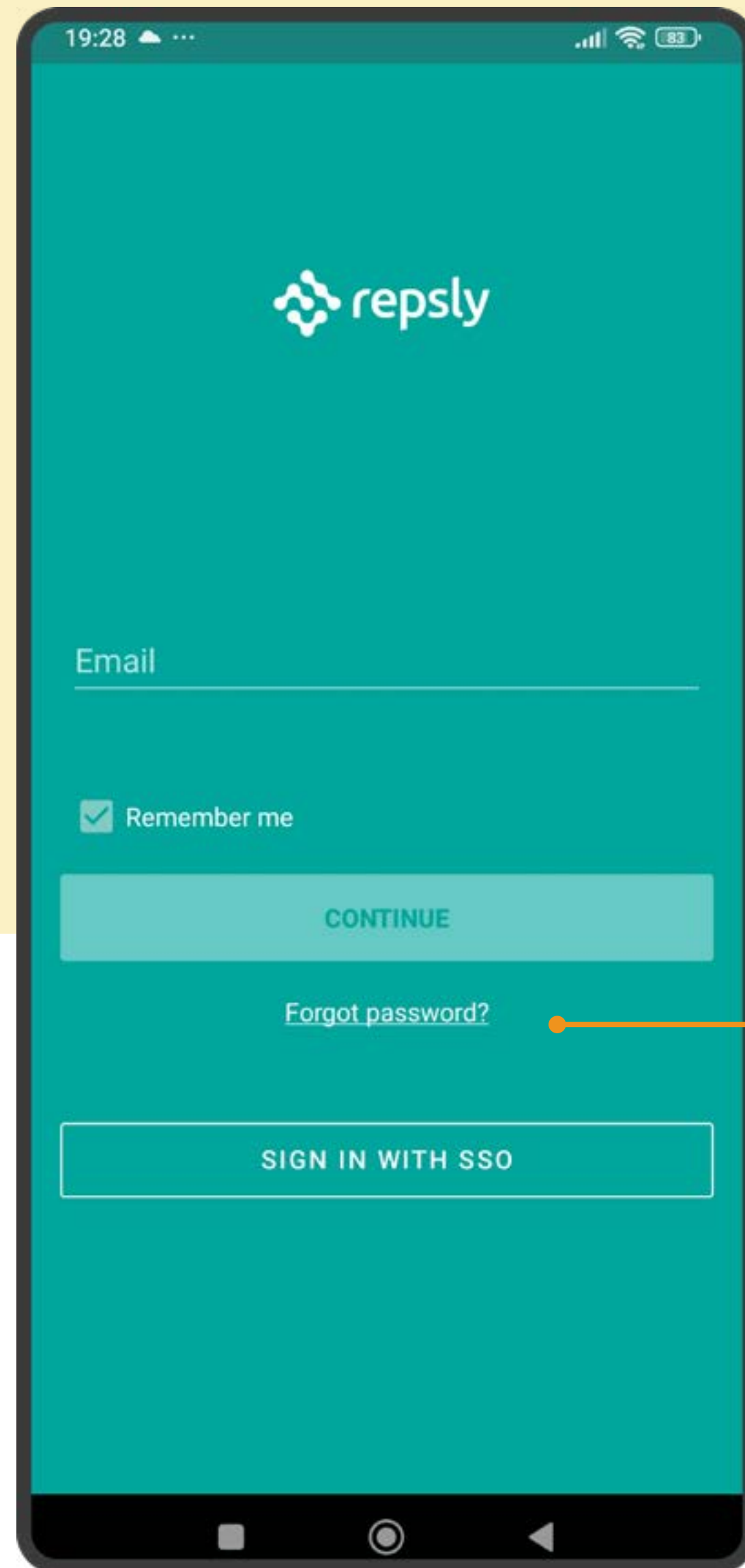
HOW TO CHANGE YOUR PASSWORD

Passwords can be changed on the mobile app.
This is a setting inside your account.

NOTE: If resetting the password isn't enabled for you, you will see a message saying *There has been a problem with your password reset request*. In this situation, your manager needs to enable the setting in the Repsly web app for you to be able to reset your password.

1 Tap **FORGOT PASSWORD** below the Continue button.

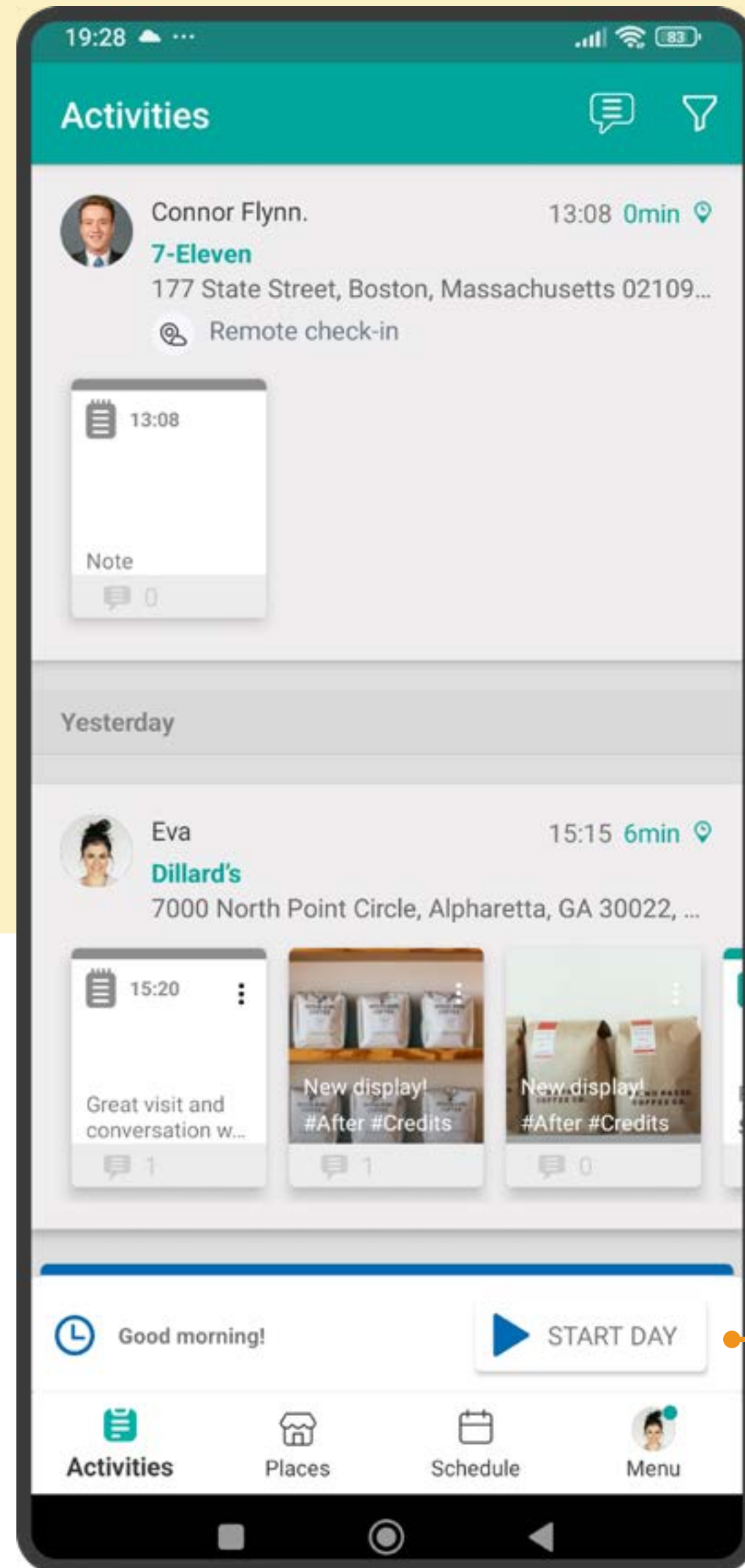
Enter your email address, and you will **2** receive an email prompting you to enter and confirm your new password.



04

HOW TO START YOUR DAY

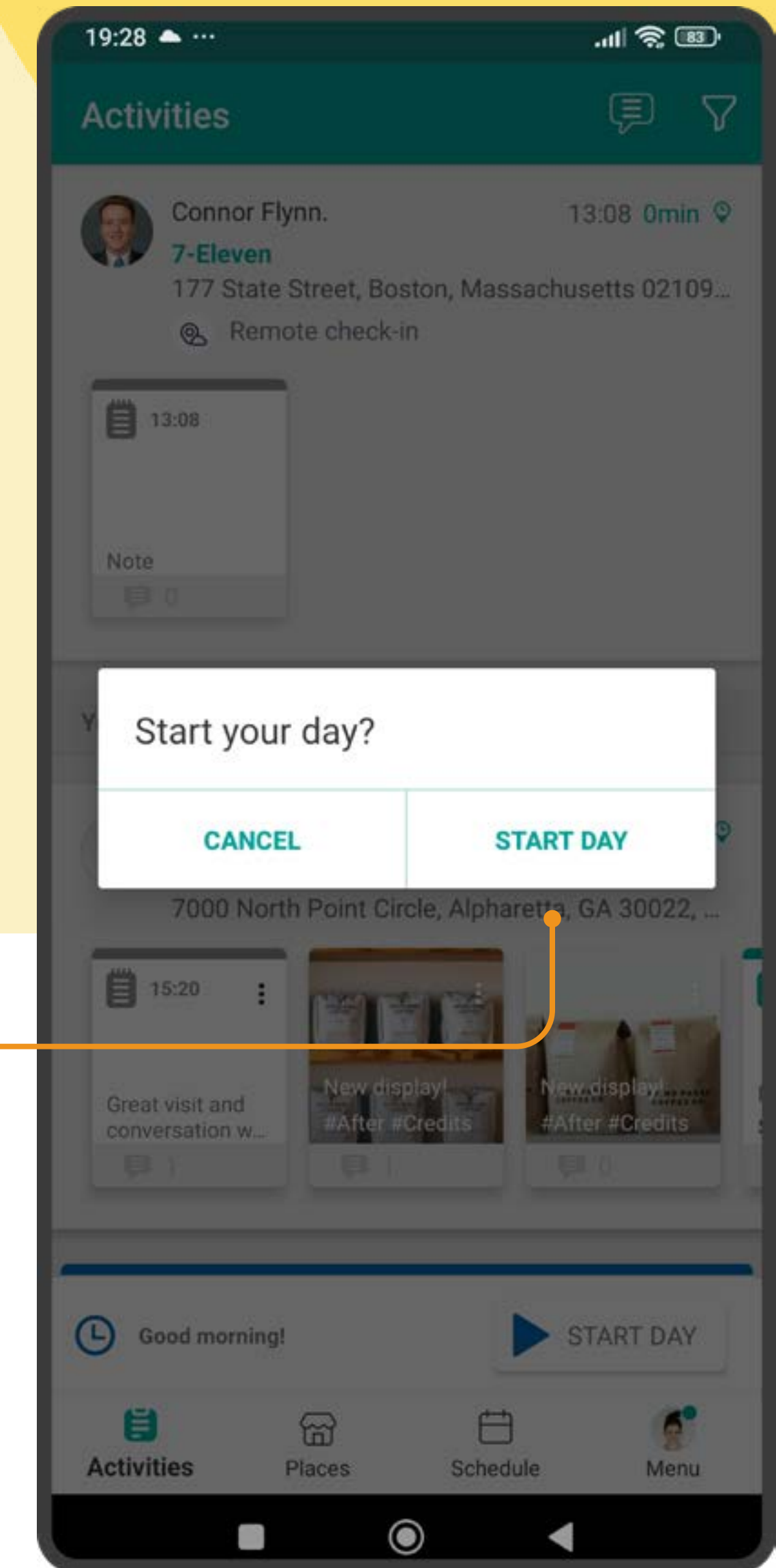
Repsly can automatically calculate your working hours and mileage in the background while you work if you're sharing your location, so you don't need to enter these details manually.



1 Tap on the **START DAY** button.

Your day will start after clicking on **START DAY**.

2



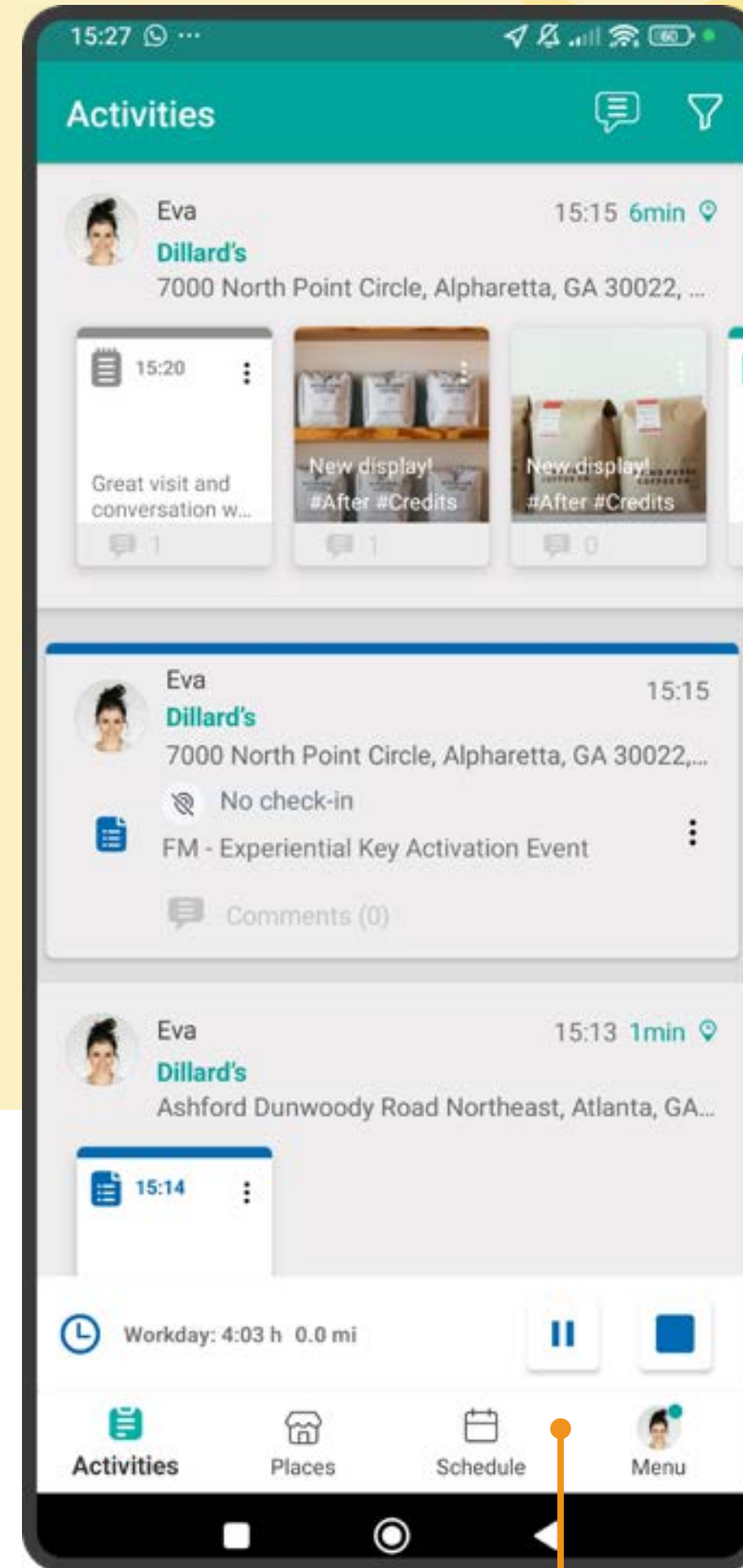
05

HOW TO PAUSE YOUR DAY

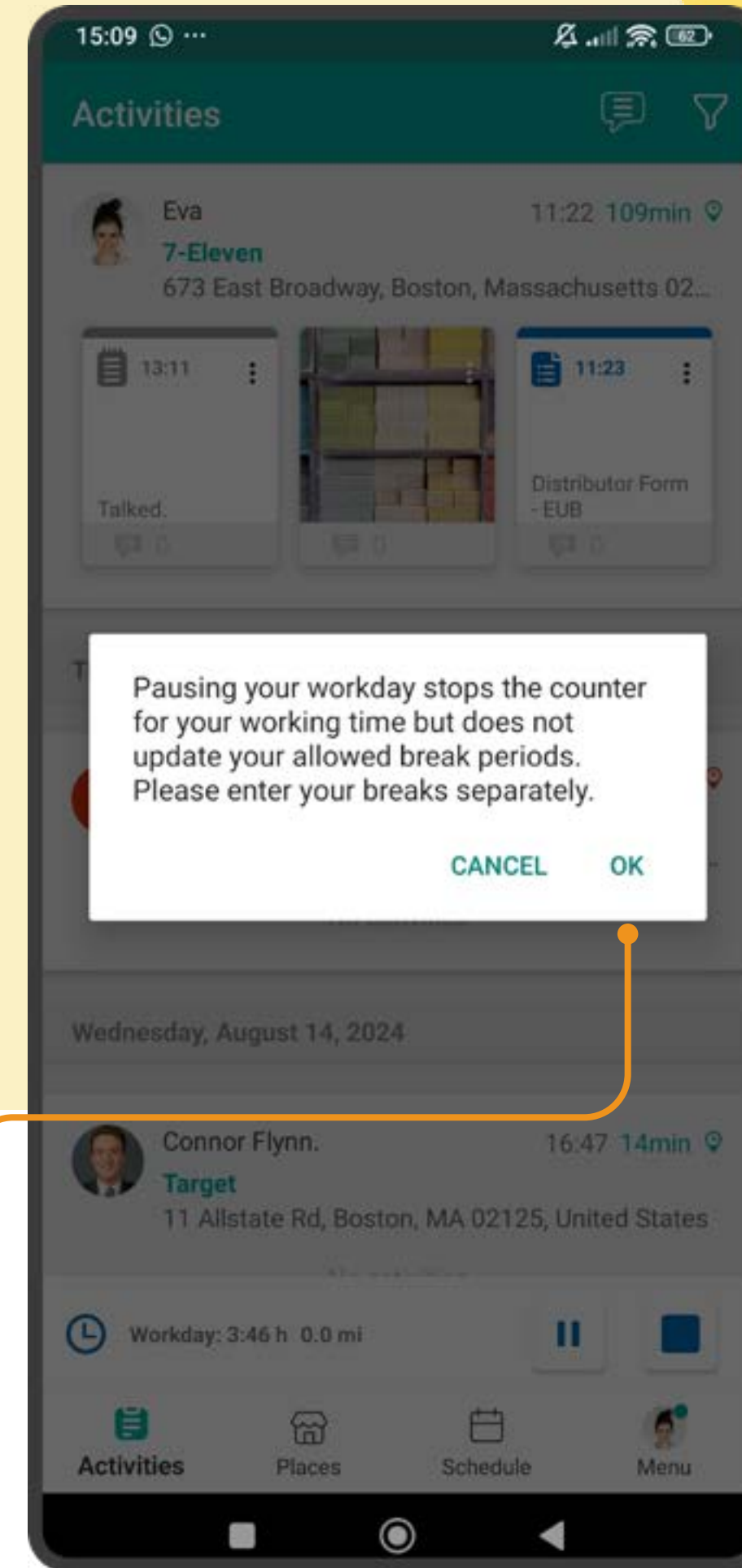
Pausing your day tells Repsly you're taking a break, so we'll stop calculating your work time and mileage traveled until you resume your work.

NOTE: You cannot pause your day while checked into a place.

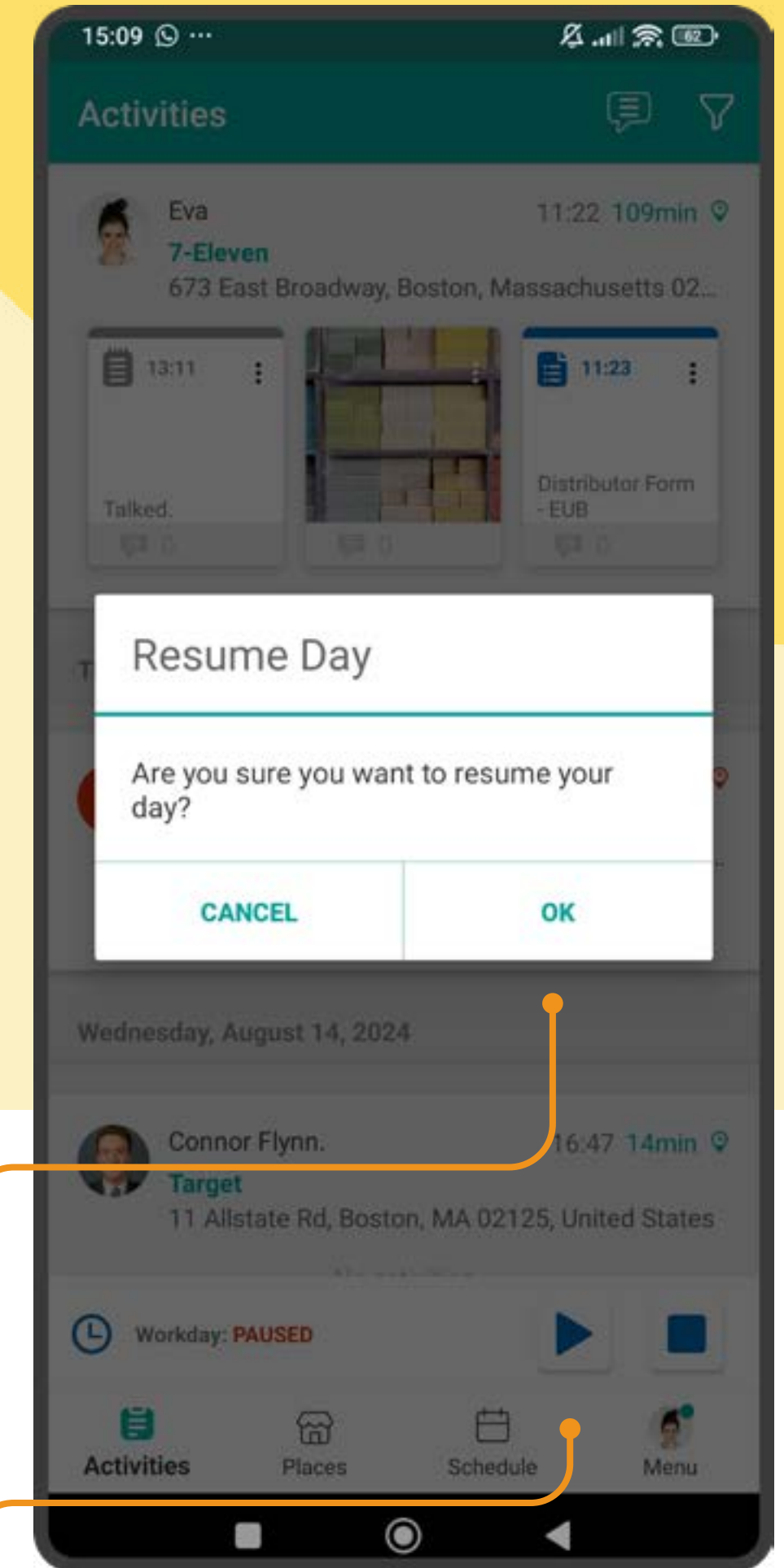
1 Tap **PAUSE**.



2 Confirm you'd like to pause your workday.



3 Tap the **PLAY** icon to resume your workday and then select **OK**.



06

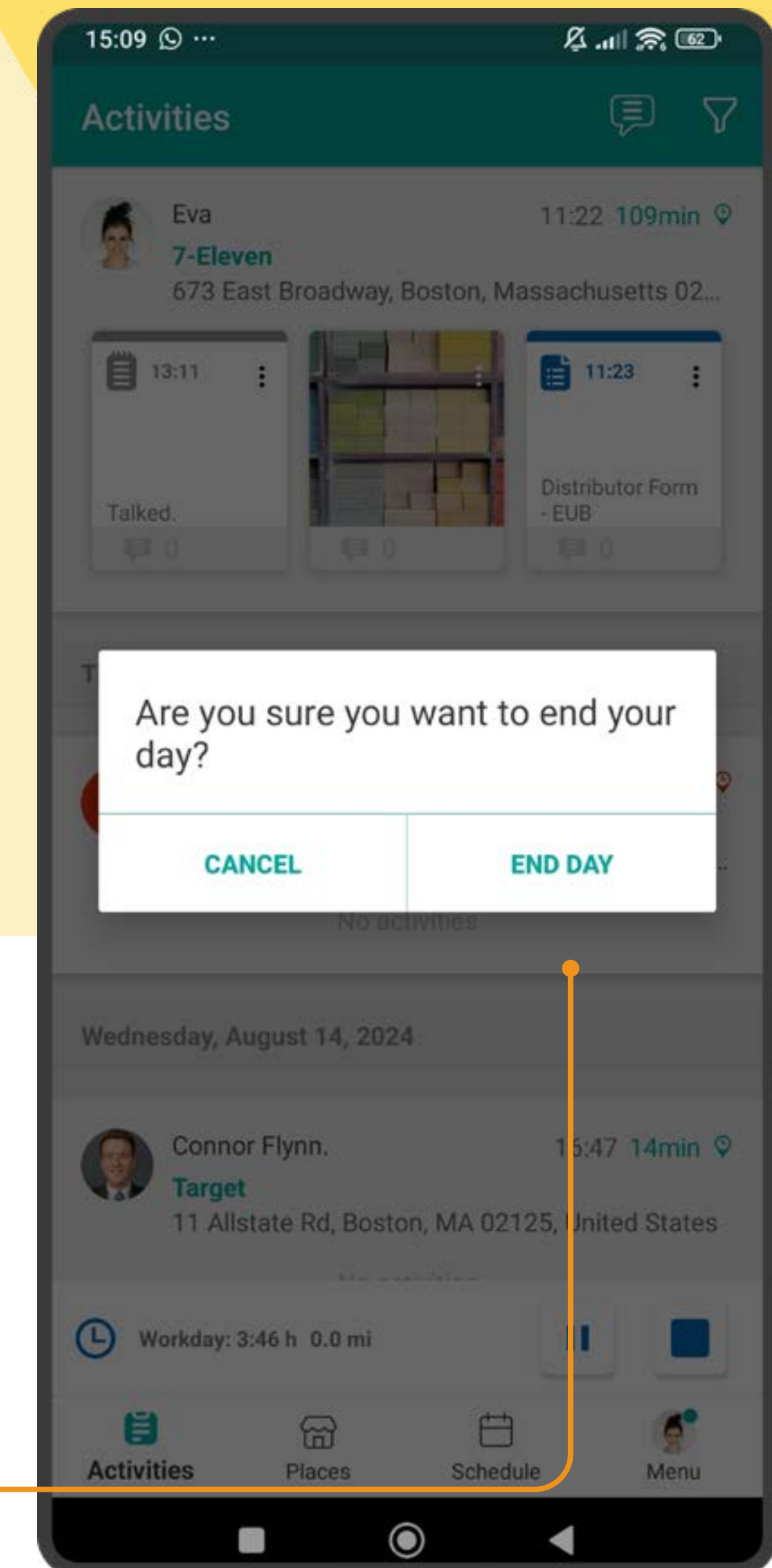
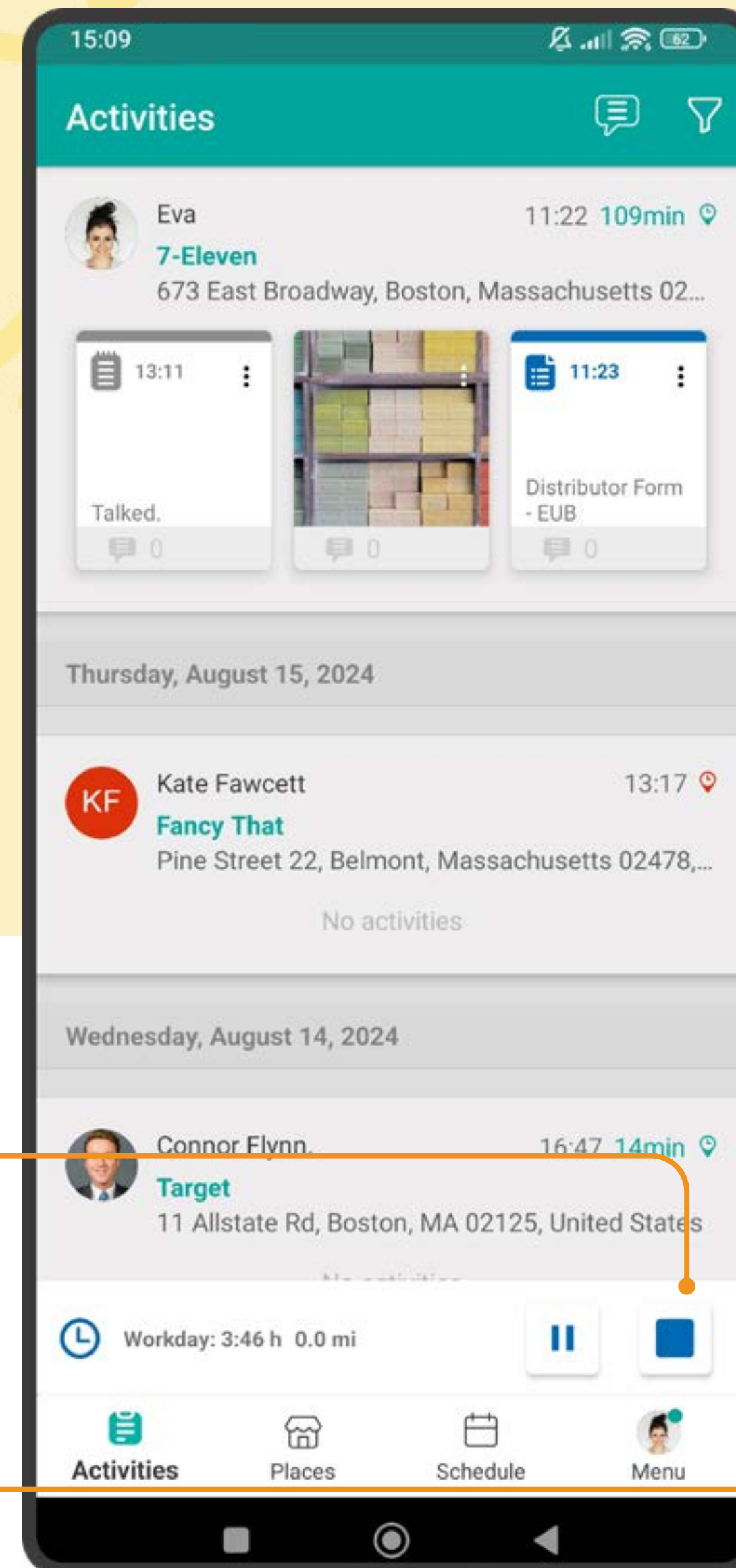
HOW TO END YOUR DAY

End your day to stop tracking time and mileage and automatically submit your workday details to your manager. **Once you end your day, you cannot restart it.**

NOTE: Repsly will automatically end your day if you haven't done so by midnight, but will not submit time and mileage data.

1 Tap **STOP** in the bottom right corner.

2 Tap **END DAY** to confirm.

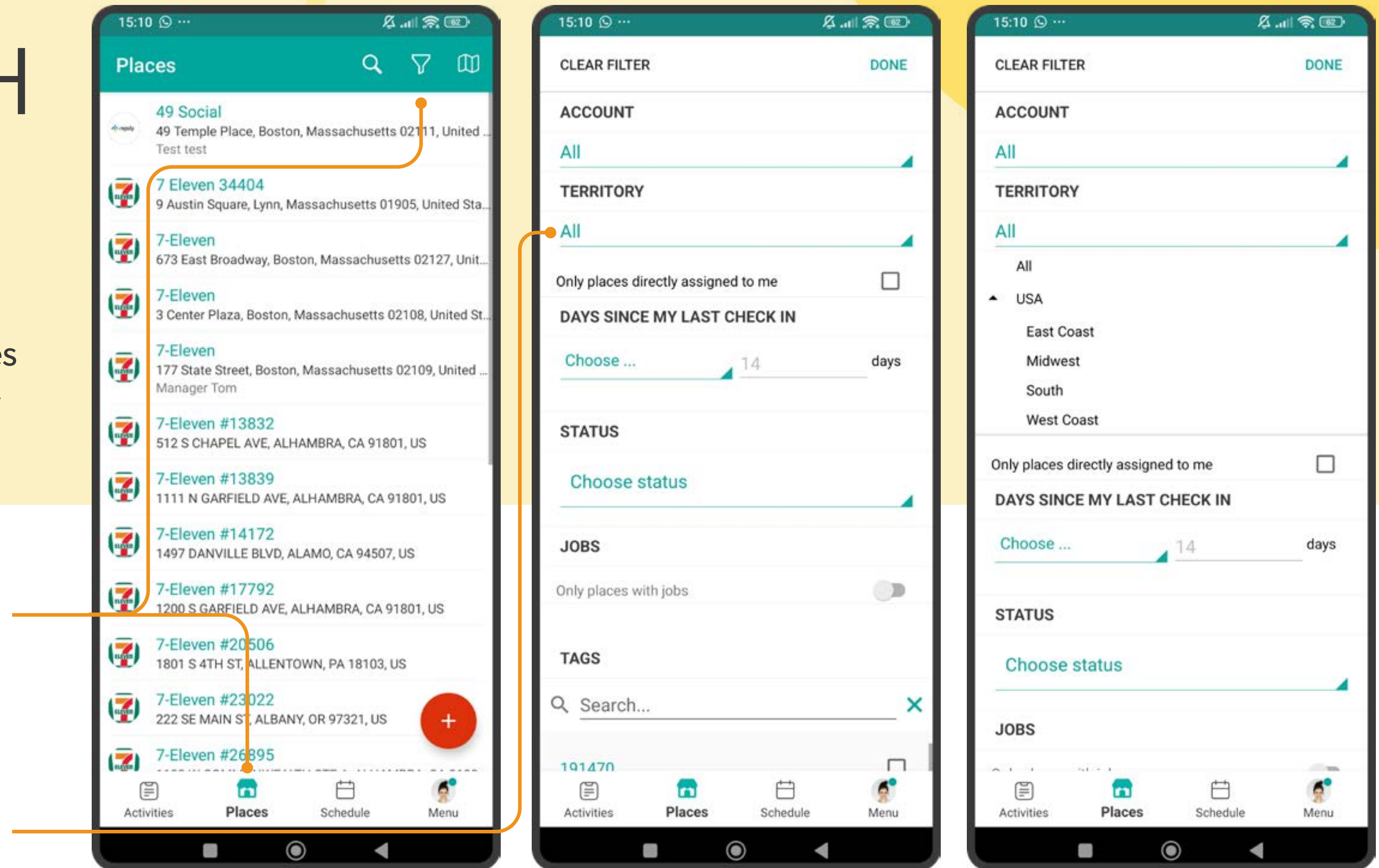


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HOW TO SWITCH TERRITORIES

If you're assigned to multiple territories, you can easily filter your place list to display places from different territories, allowing you to stay organized on the go.

- 1 To switch territories, tap on the **PLACES** tab and then on the **FILTER** icon.
- 2 Tap **ALL TERRITORIES**, then select the available territory you'd like to display.

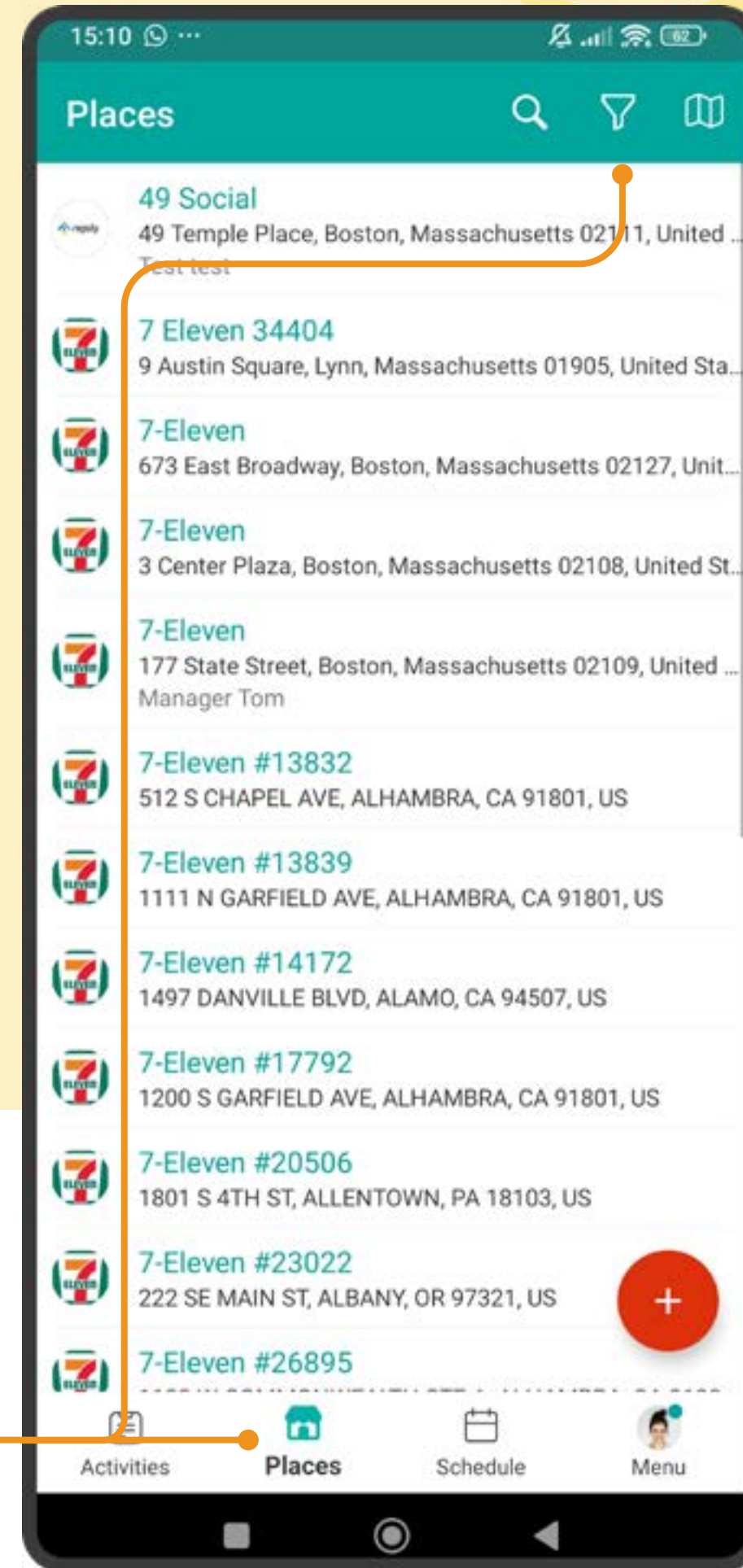


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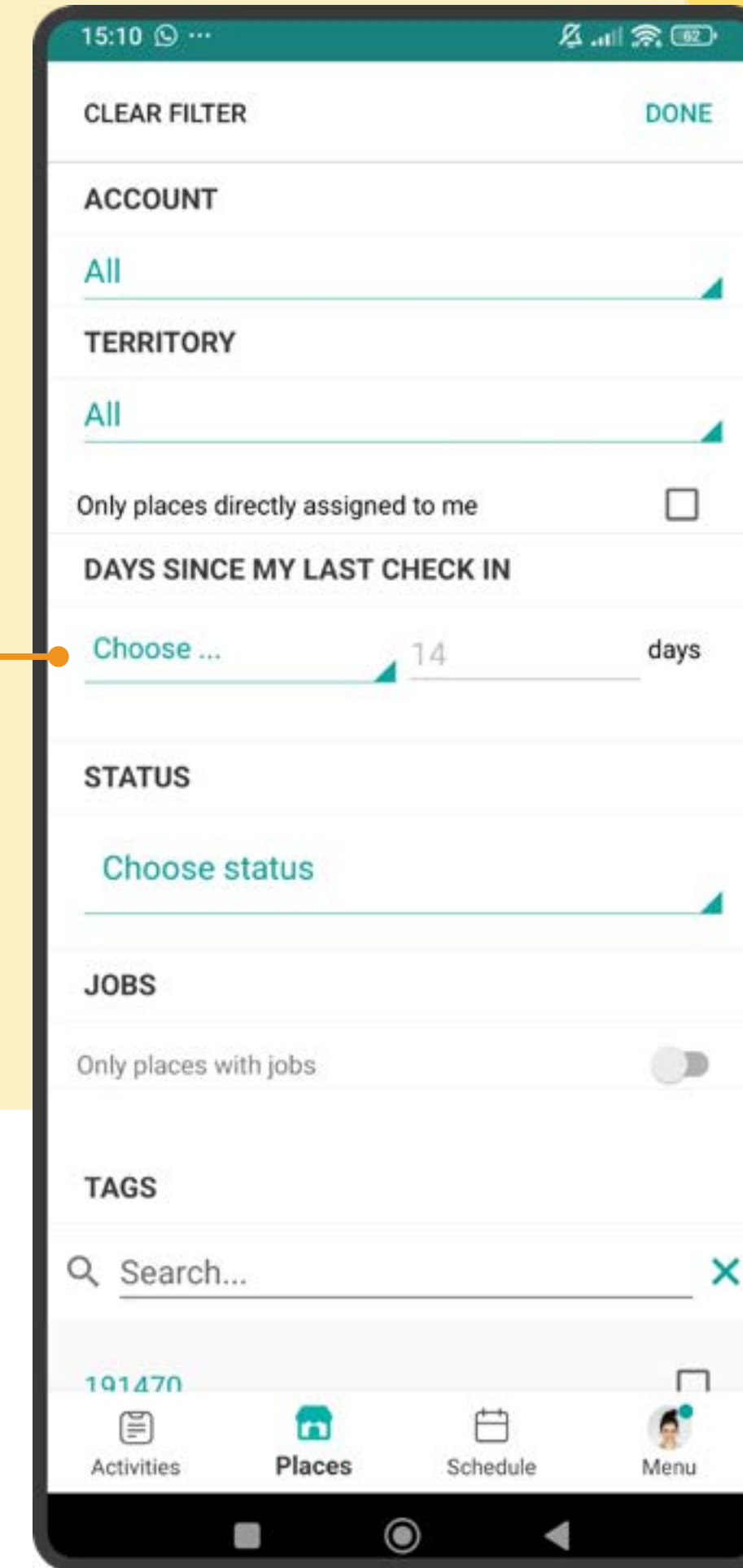
HOW TO FIND PLACES THAT HAVEN'T BEEN VISITED

Repsly makes it easy to improve territory coverage by showing you the places you haven't visited recently, so you can add them to your schedule for follow-up.

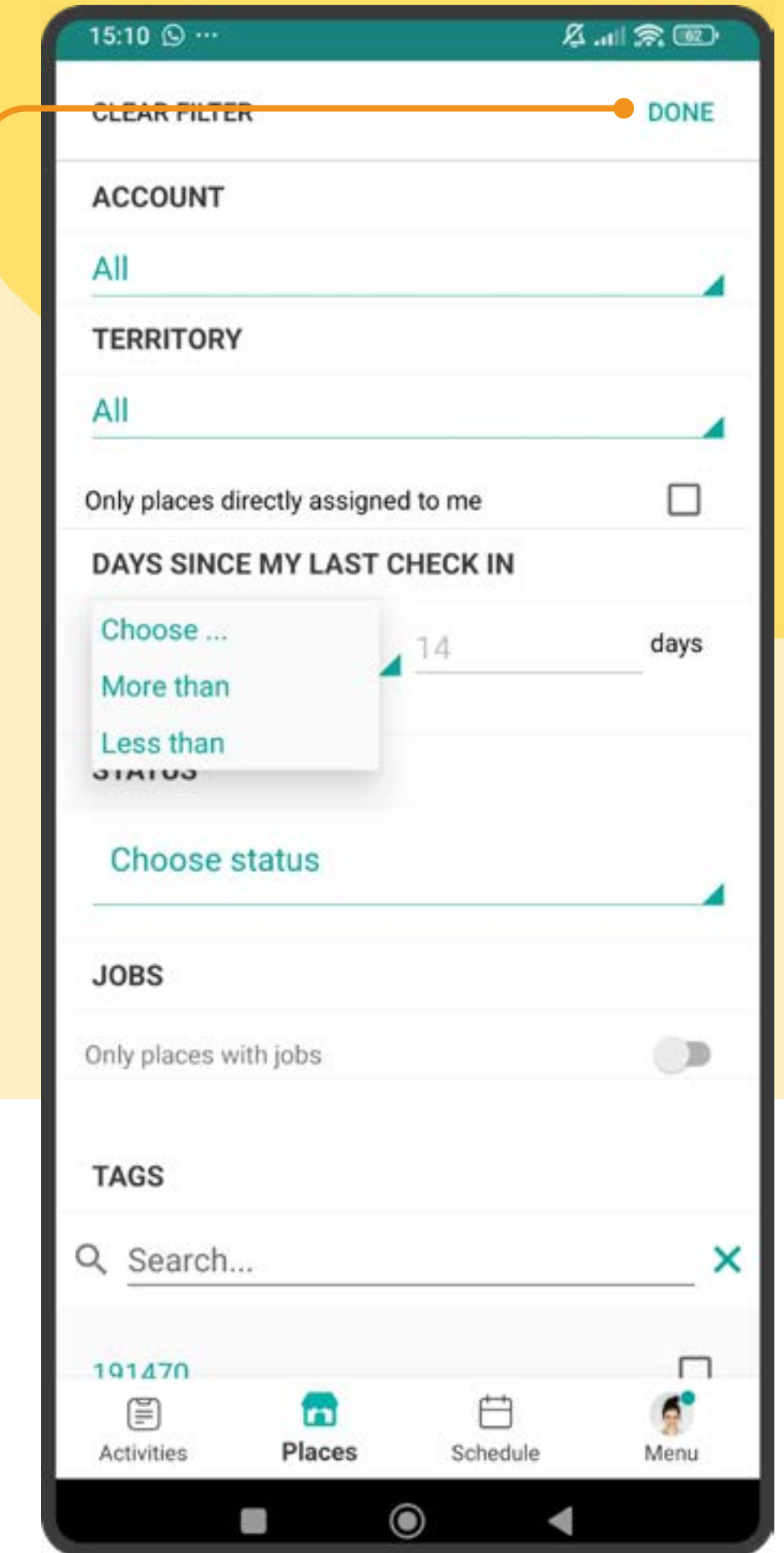
1 Tap on the **PLACES** tab and then on the **FILTER** icon.



2 Tap **DAYS SINCE LAST CHECK IN**, and select the date range you want to view.



3 You can narrow down the criteria further using additional filters (such as place or tags). Click **DONE** to view your refined place list.



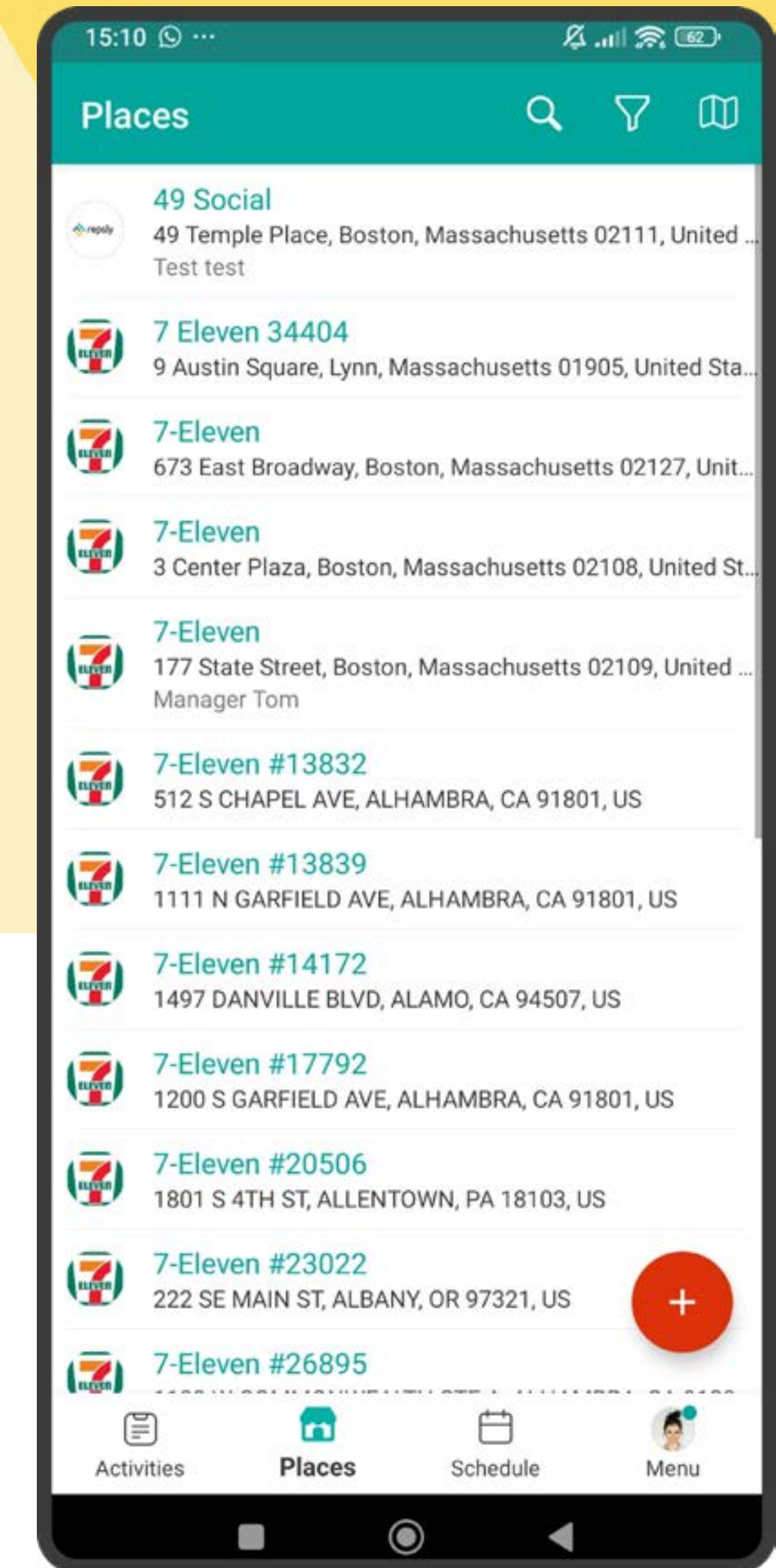
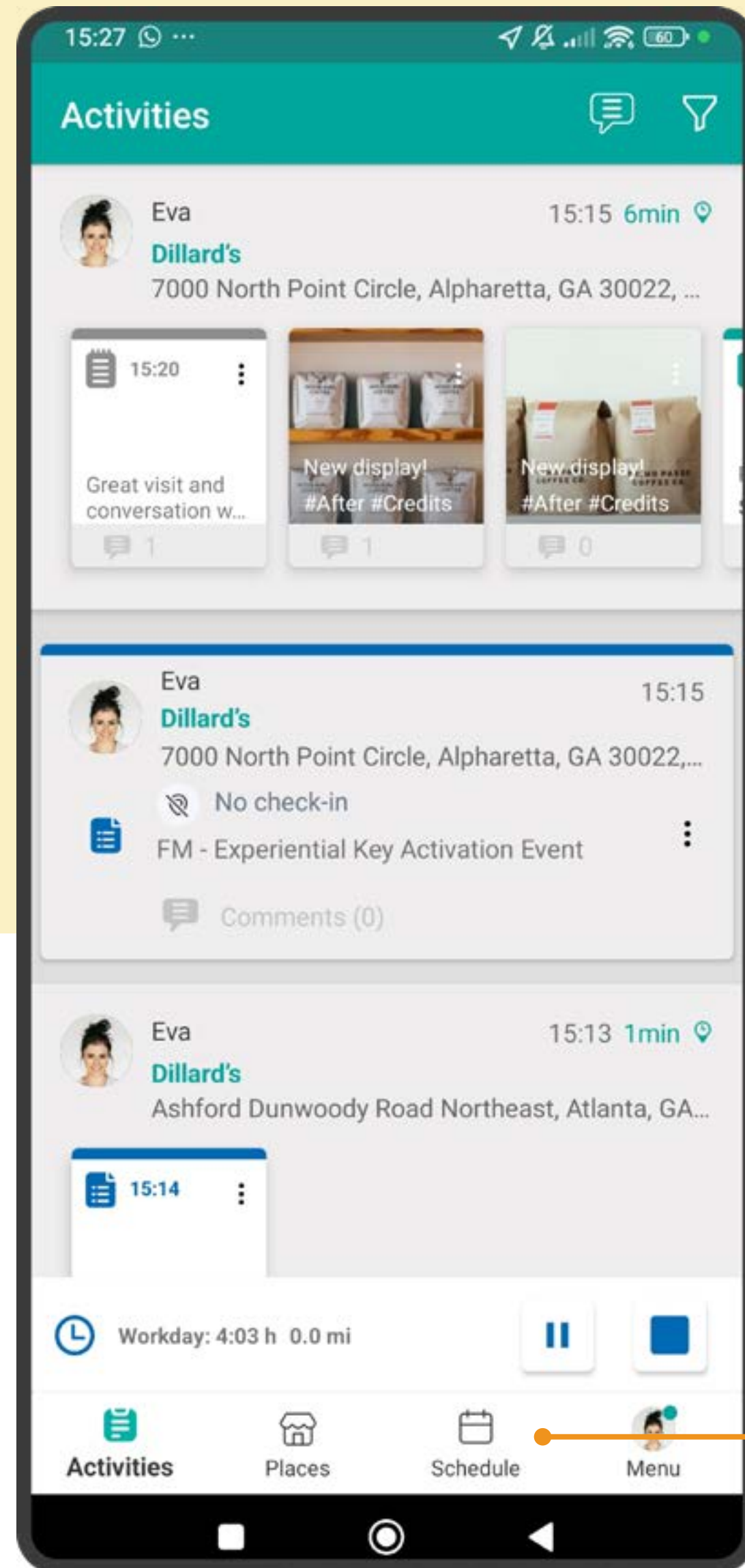
09

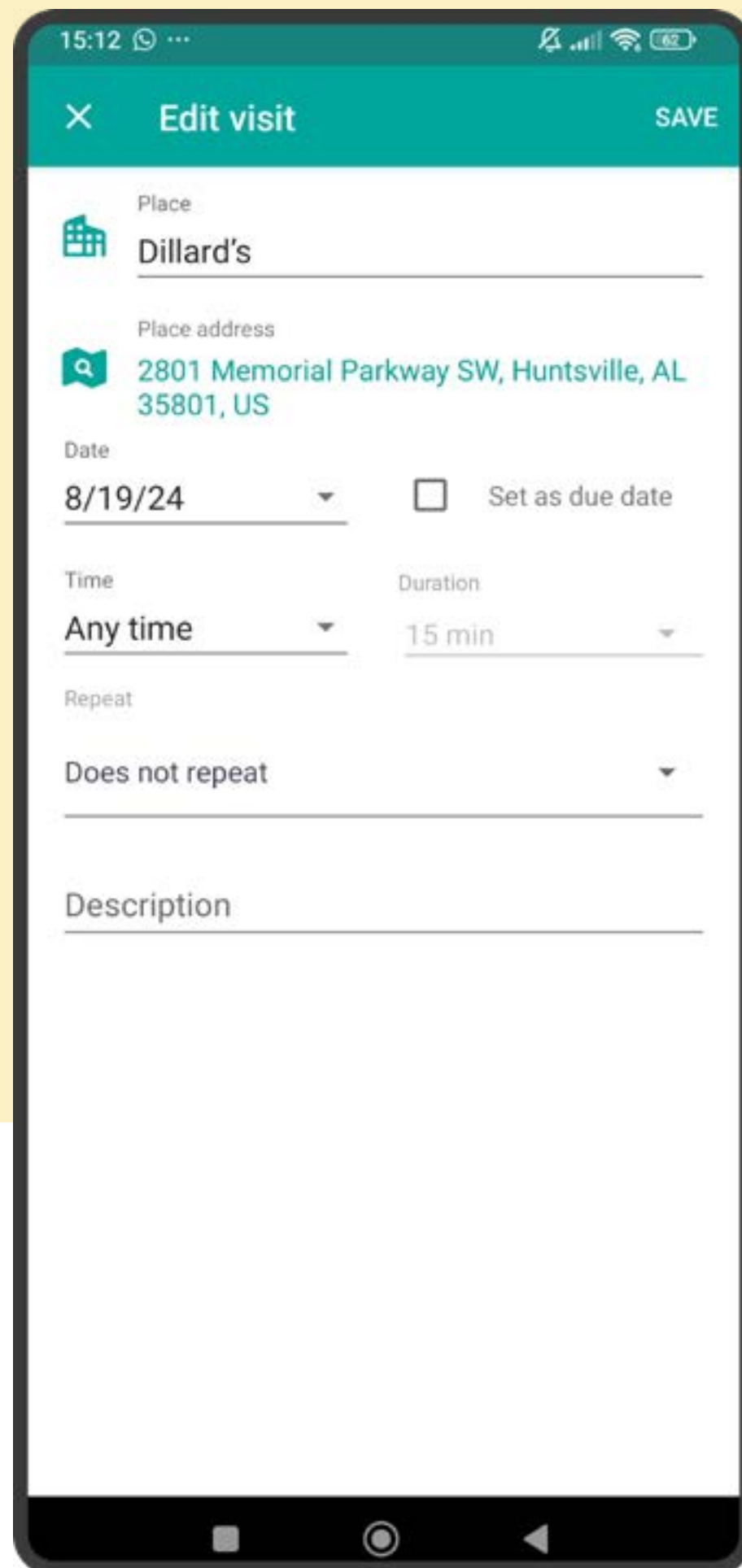
HOW TO USE THE SCHEDULE

The schedule gives you a snapshot of everything you need to do for the day. Depending on your account settings, you can also proactively manage your visits, set follow-up meetings from the field, or make changes to your schedule on the go as priorities change.

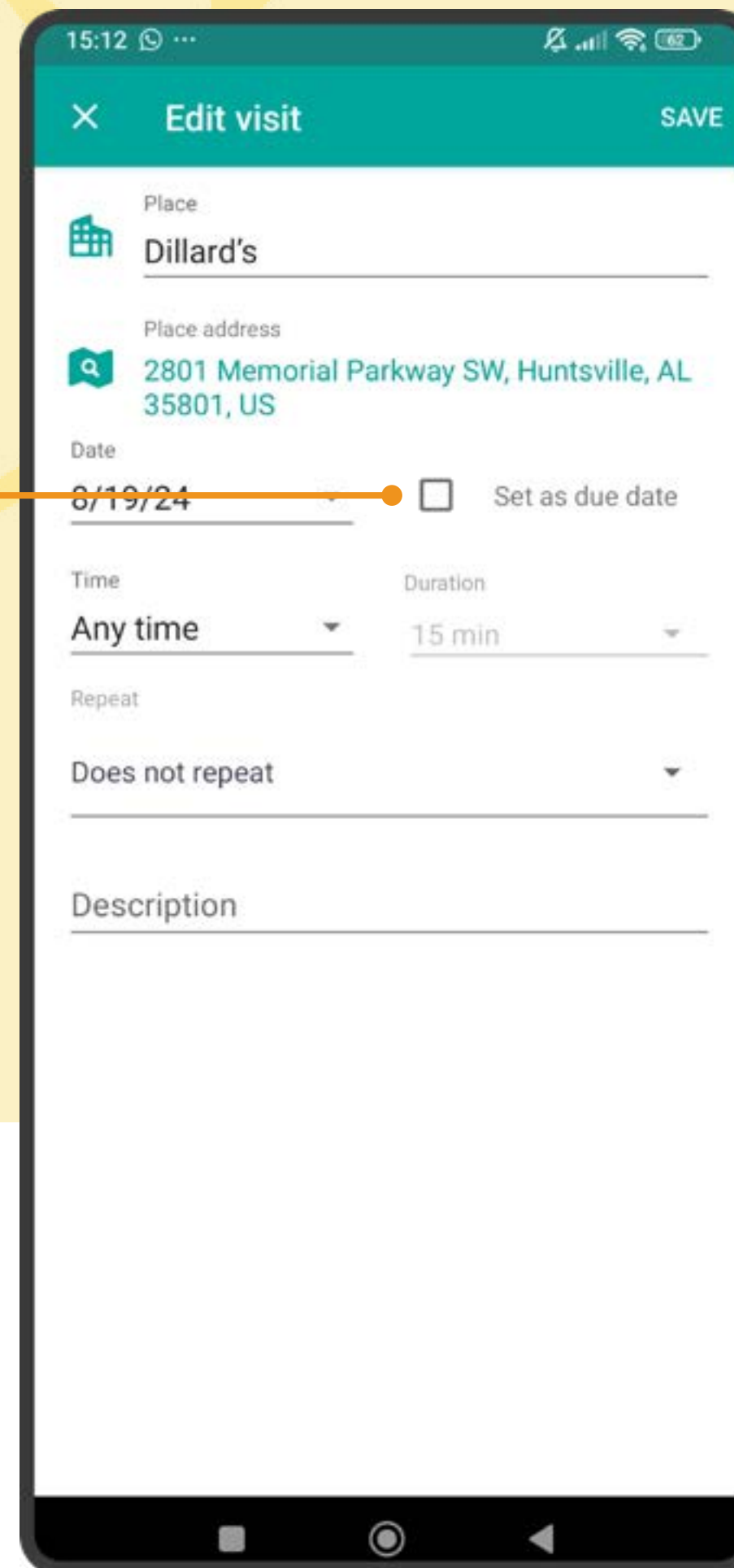
1 Tap on the **SCHEDULE** tab.

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

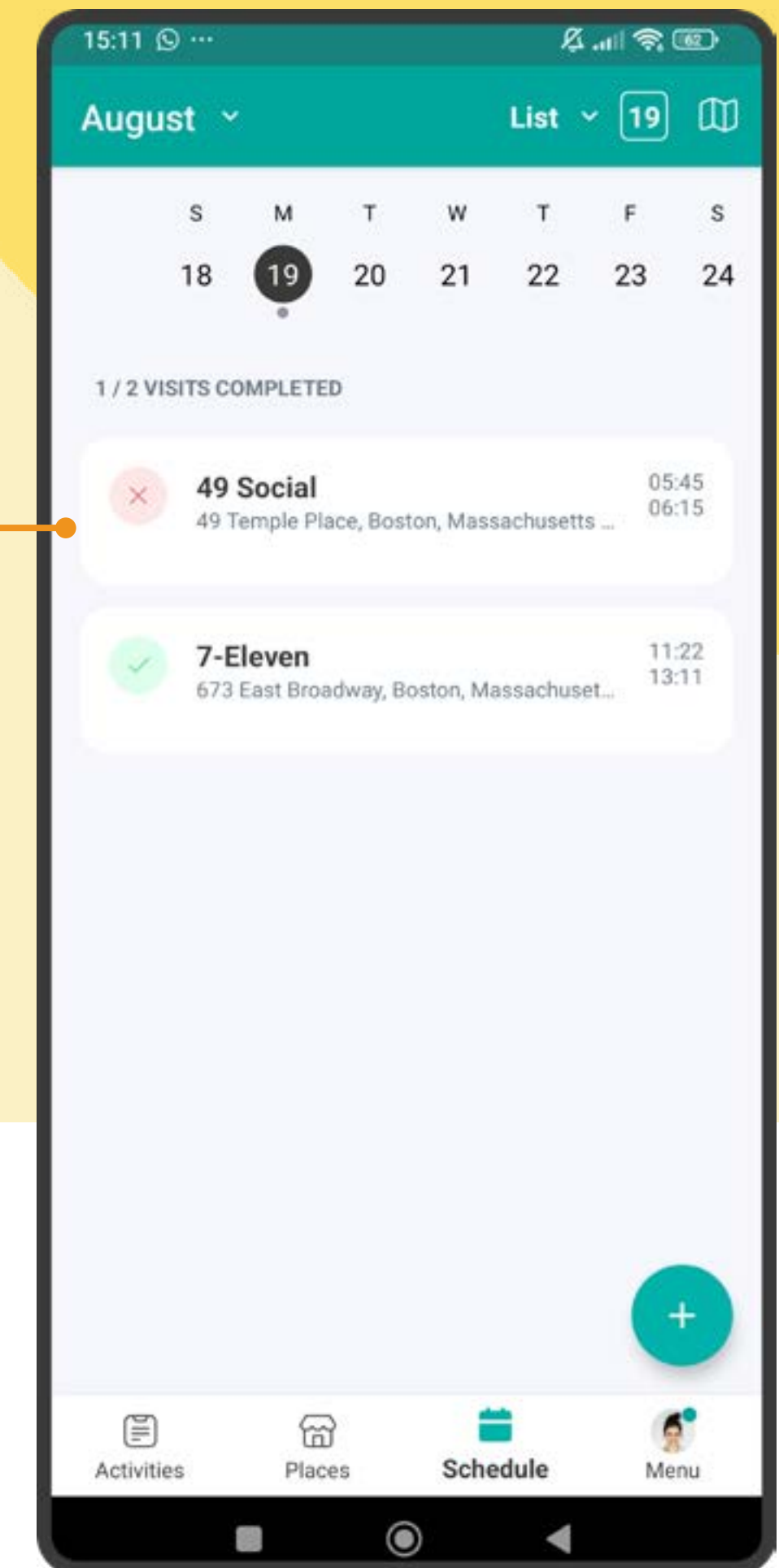




3 Select the **DATE** and **TIME** for the visit.



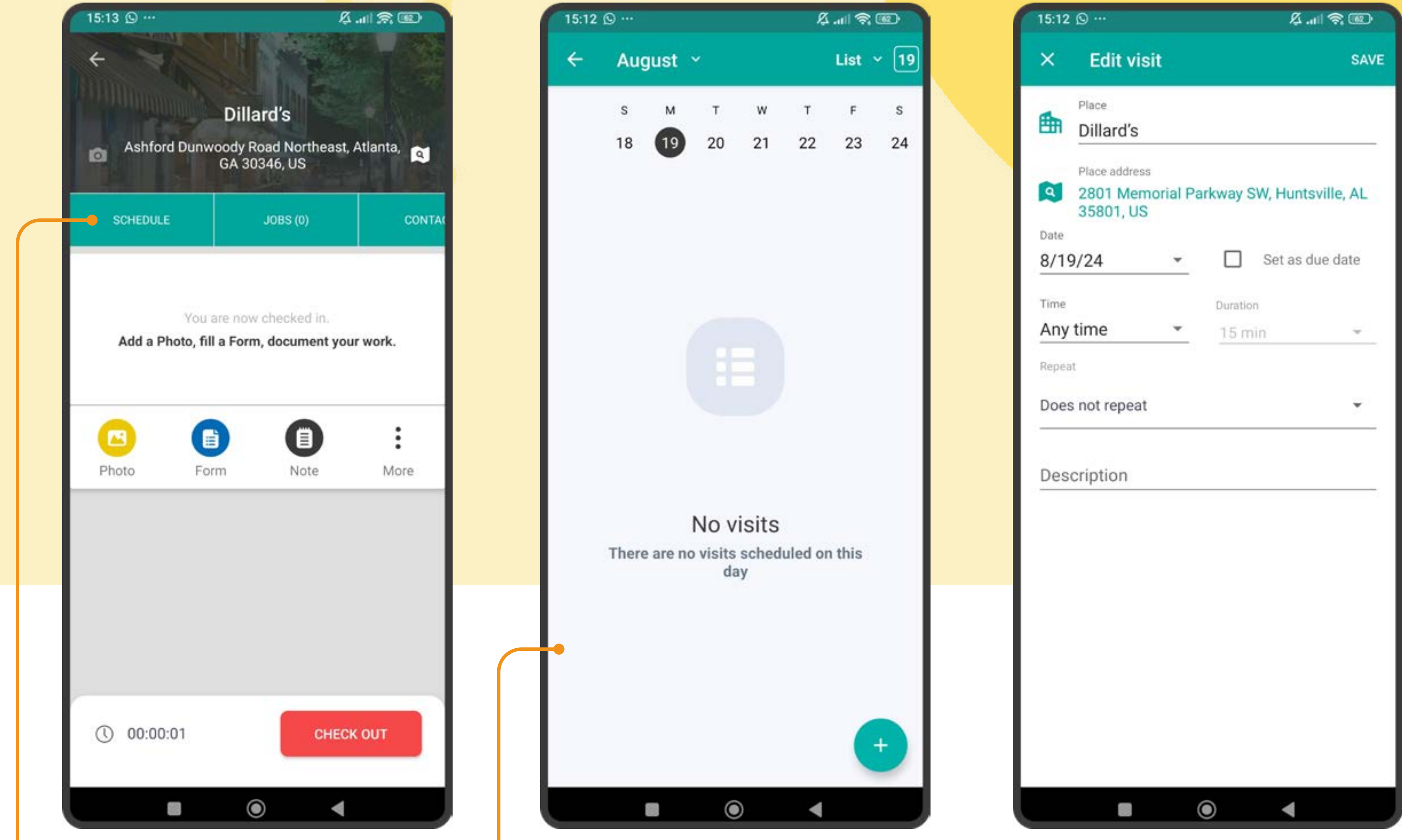
4 On this page, you can also select whether or not the visit is recurring and leave a note about the visit.



5 Scheduled visit will be visible in the schedule like this.

HOW TO ADD VISITS FROM THE PLACE PAGE

You can also schedule new visits right from the Place page, making it easy to add follow-up visits while checked into a place or reviewing the account history.



- 1 Select a place for which you want to schedule a visit. Click on the **SCHEDULE**.
- 2 Click on a **GREEN + SIGN** to add a new visit.
- 3 Select the **DATE** and **TIME** for the visit. You can also select whether or not the visit is recurring and leave a note about the visit.

10

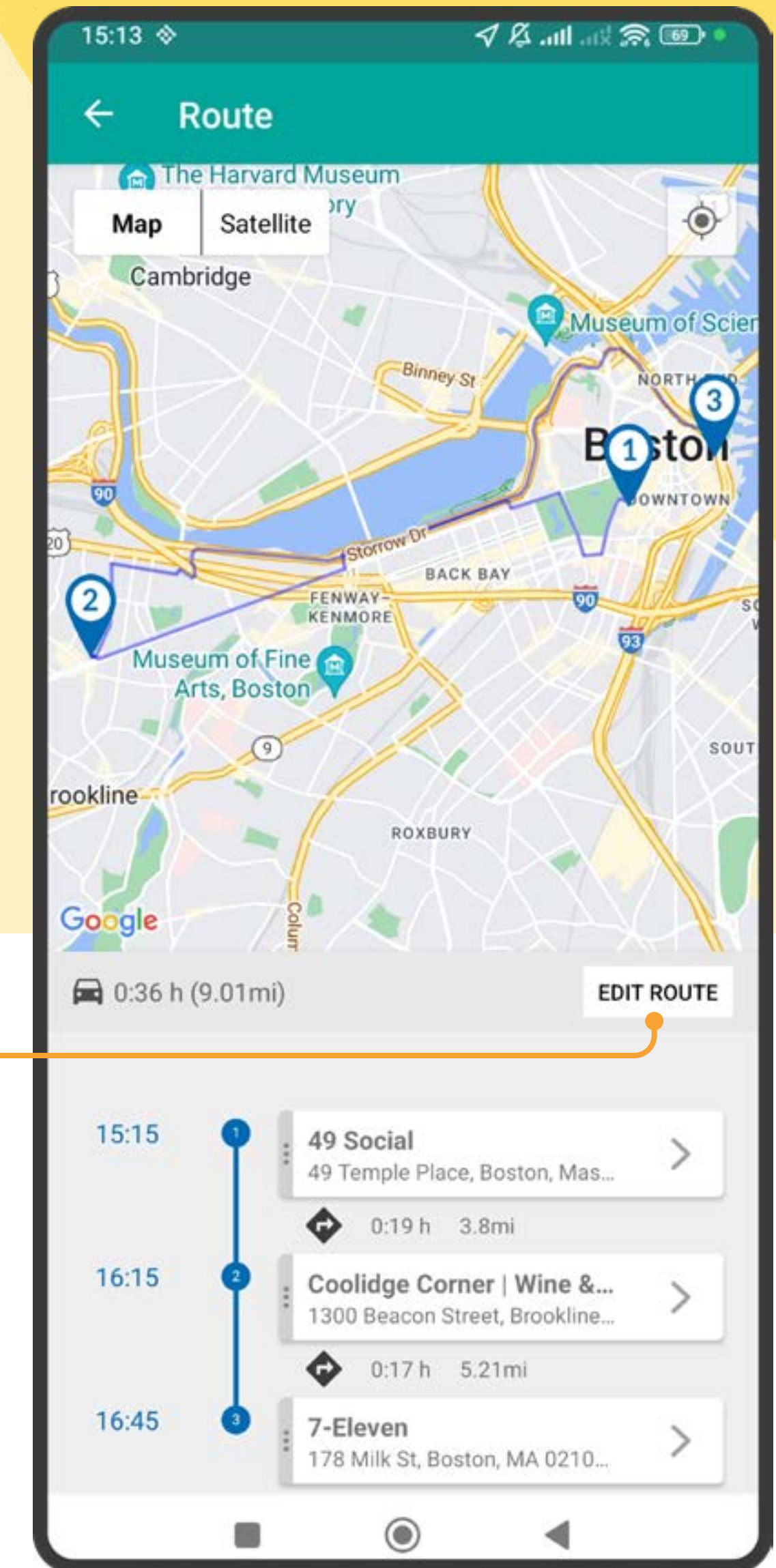
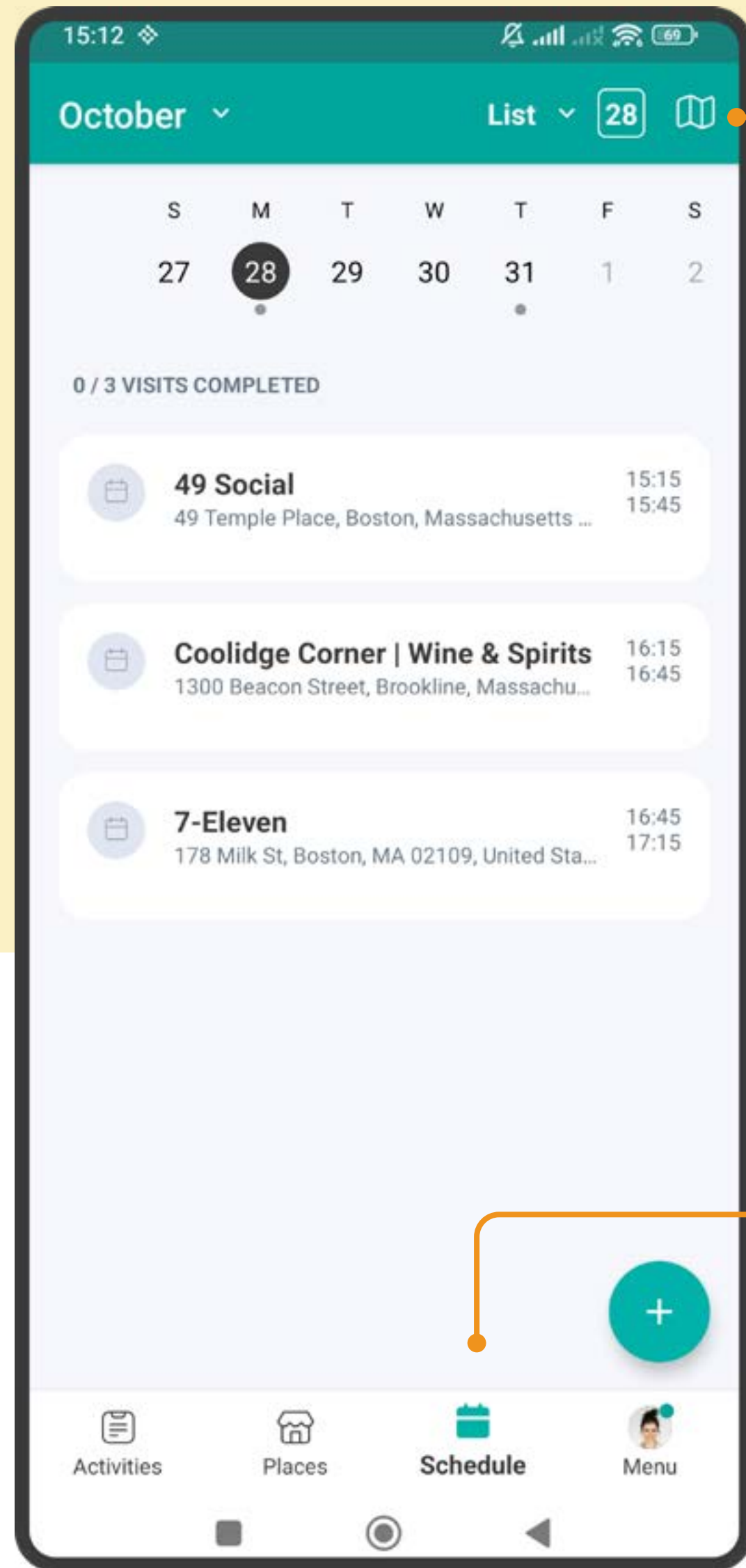
HOW TO USE THE ROUTE OPTIMIZATION TOOL

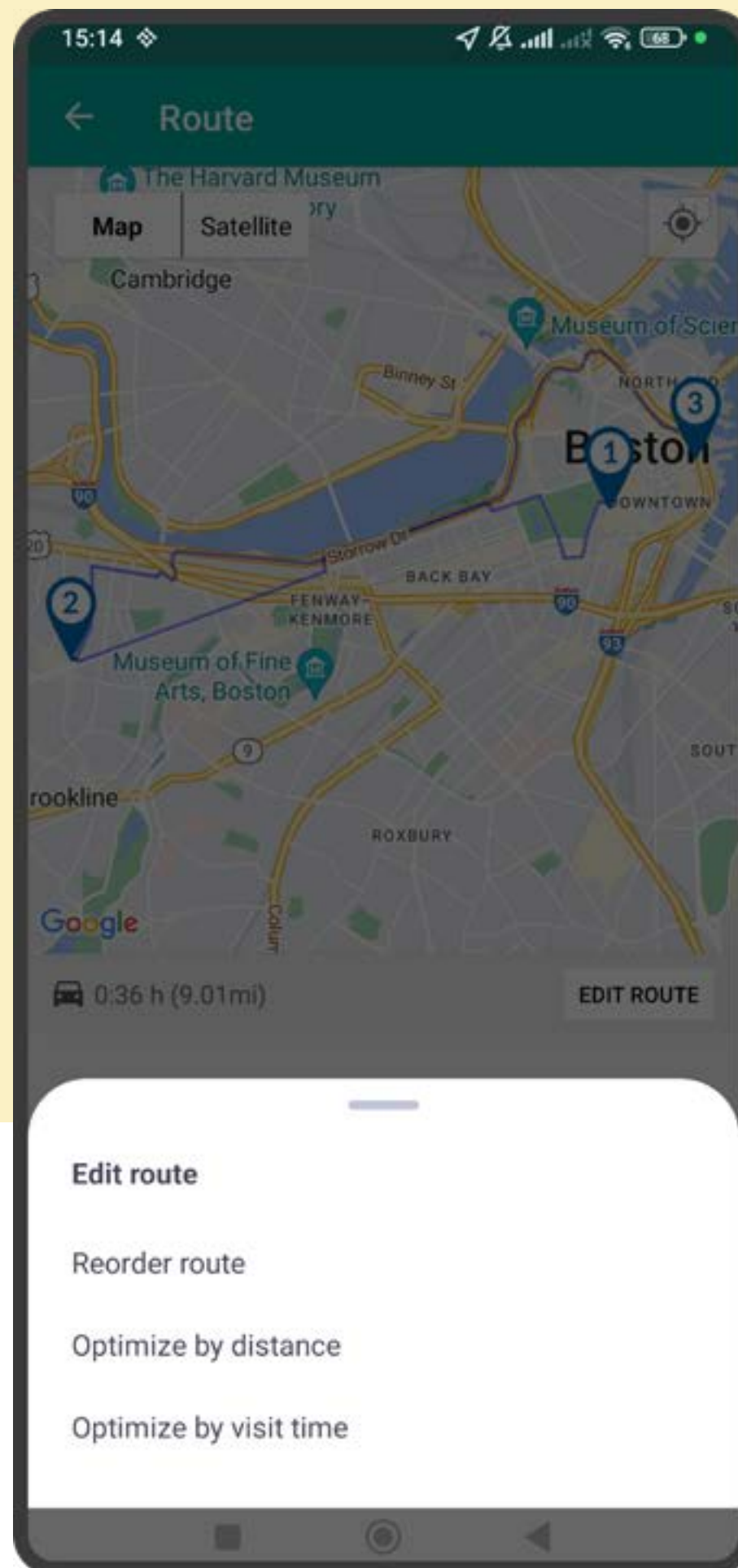
Route optimization finds the quickest route between points, reducing travel time, fuel costs, and improving efficiency, especially for multiple destinations with time constraints.

Visits must be scheduled to enable route optimization.

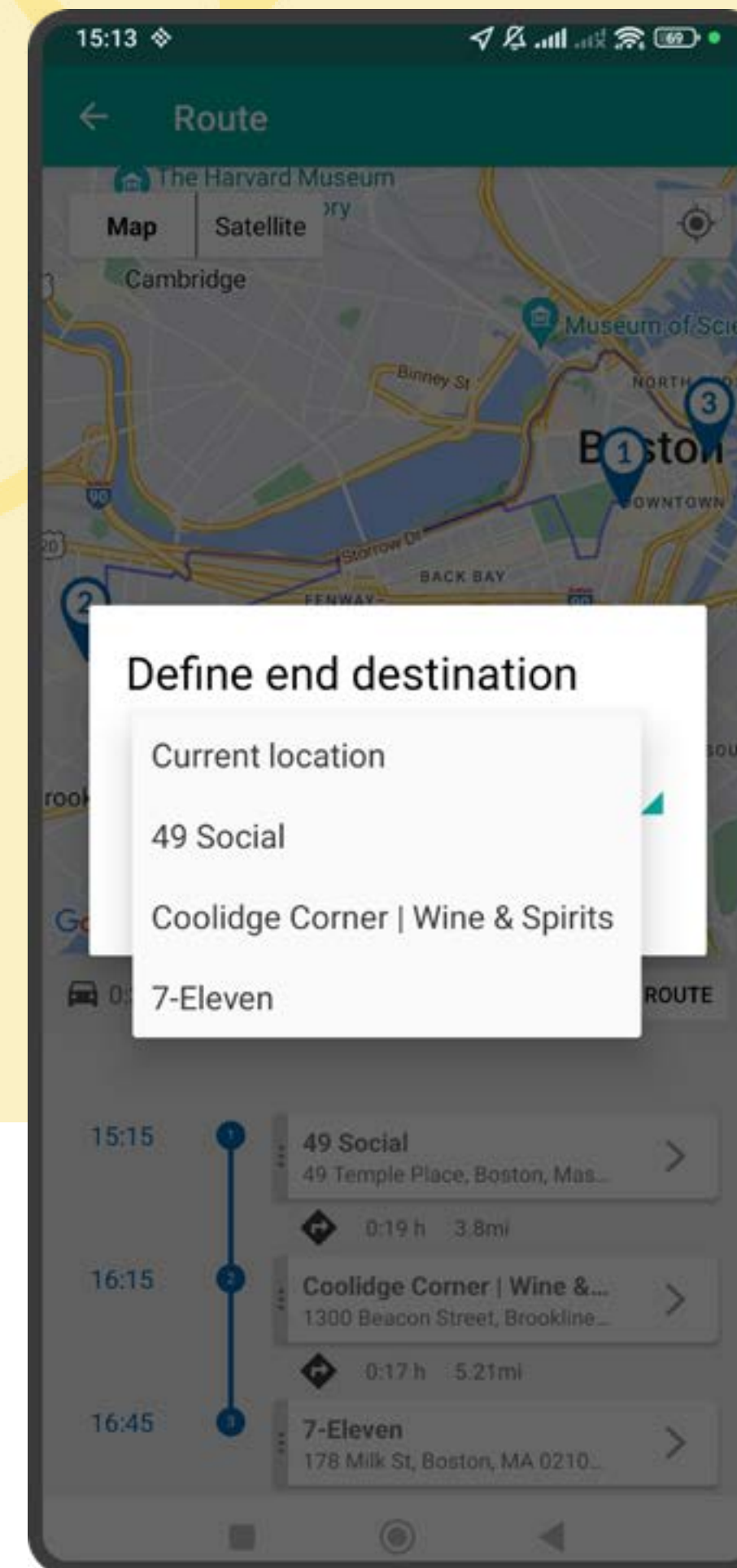
- 1 Tap on the **SCHEDULE** tab.
Click on the **MAP ICON**.

You can now see all scheduled locations. Tap **EDIT ROUTE**.

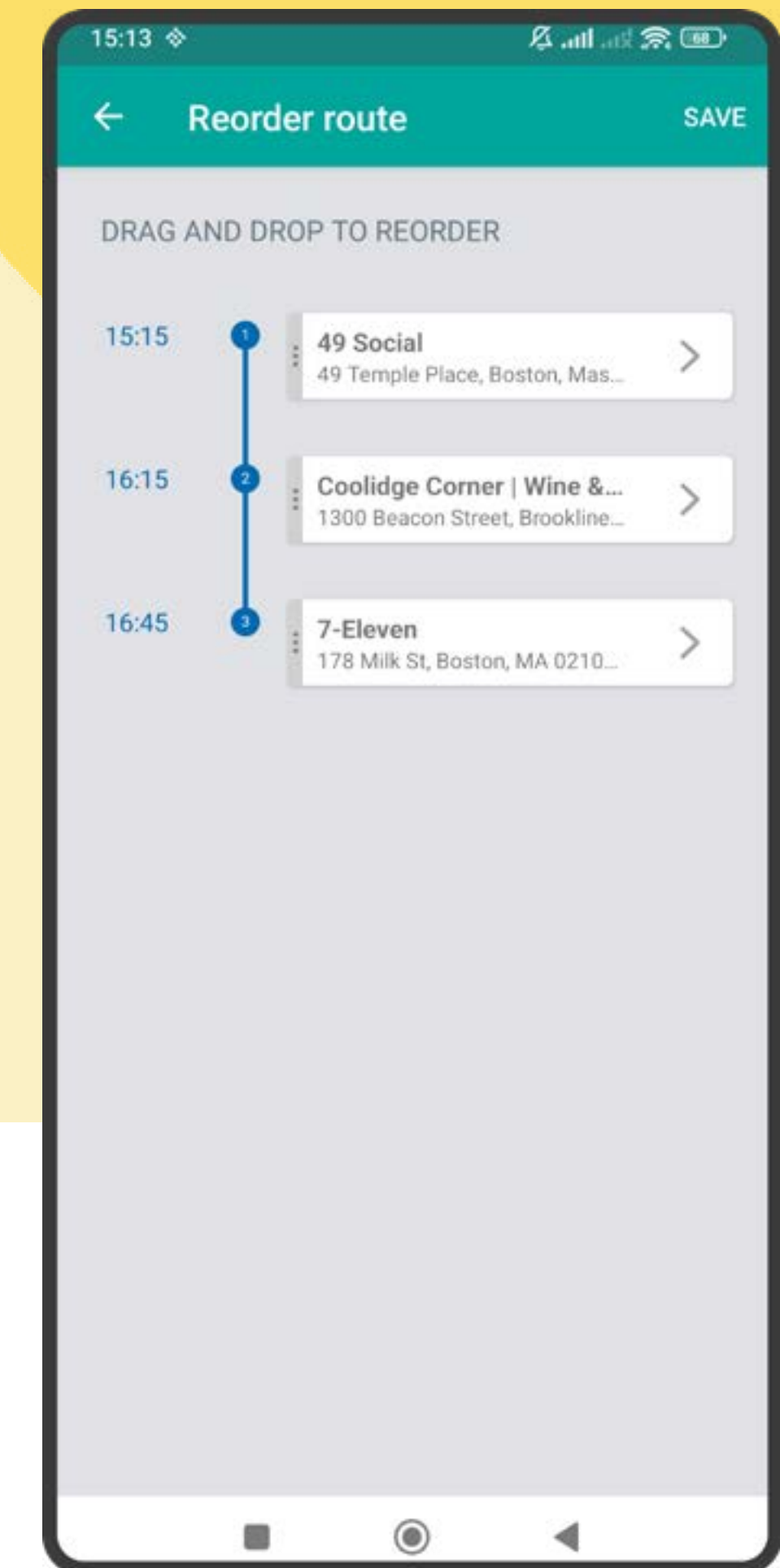




3 Select the preferred route optimization option.



4 If you choose **OPTIMIZE BY DISTANCE**, select the starting location.



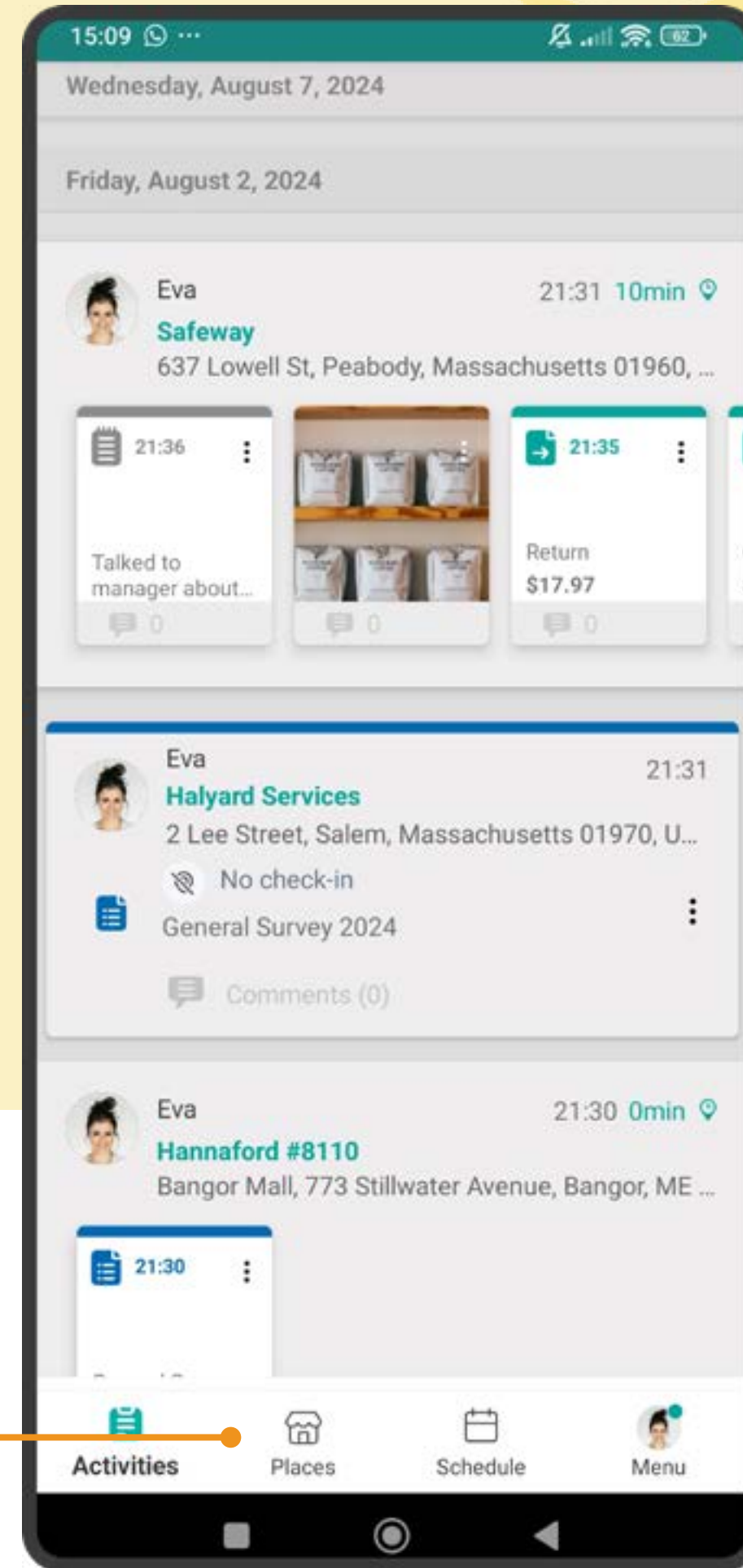
5 If you choose **REORDER ROUTE**, manually adjust the order by tapping and holding a location, then dragging it up or down until finalized.

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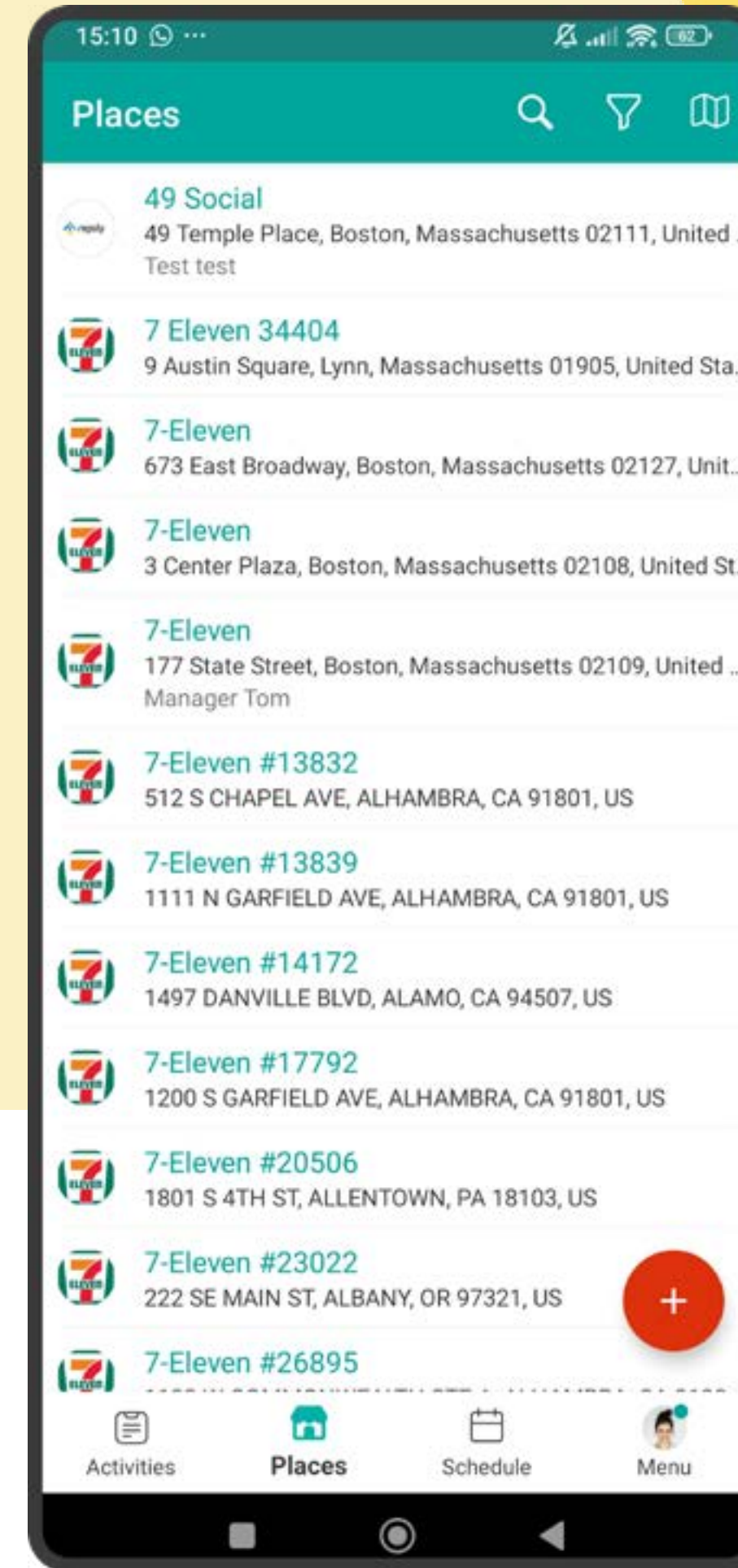
HOW TO CHECK IN

Checking into a place at the beginning of each visit makes sure all of your activity gets properly tagged to the right place, and helps you better understand how you spend your time during the workday.

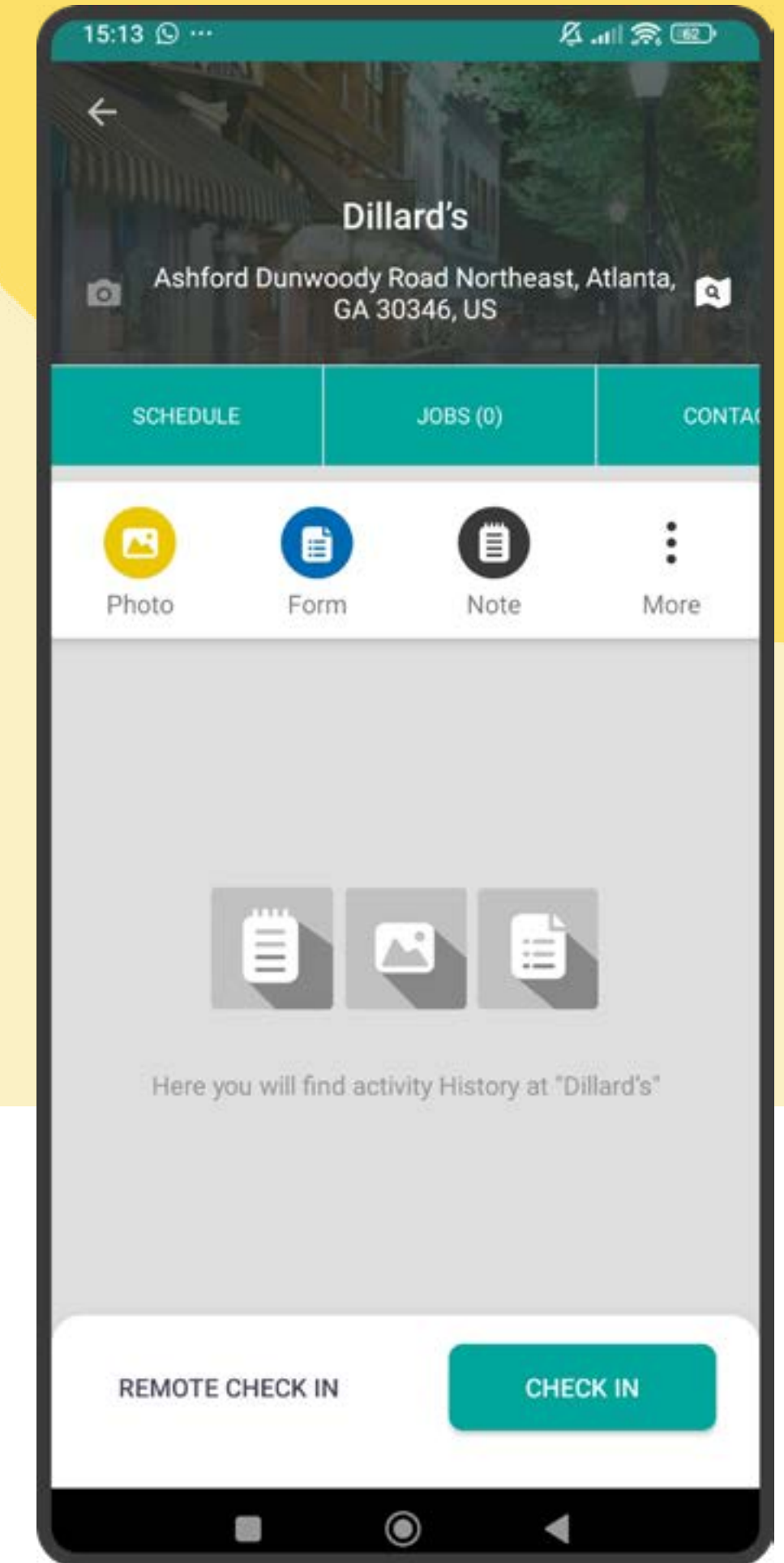
1 Tap on the **PLACES** tab.



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



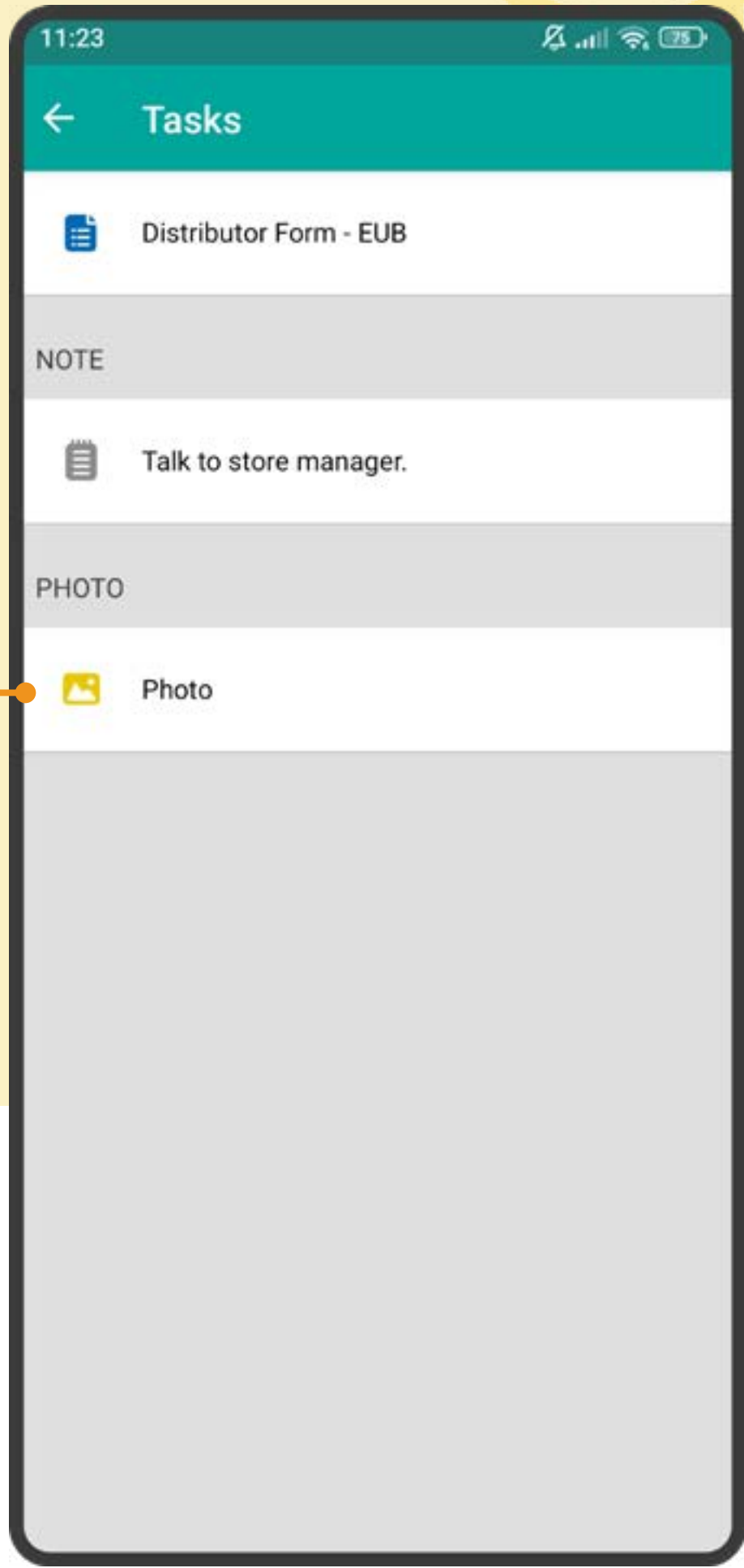
3 Tap on the green **CHECK IN** button. You are now checked in. Use the buttons on the screen to complete your store visit.



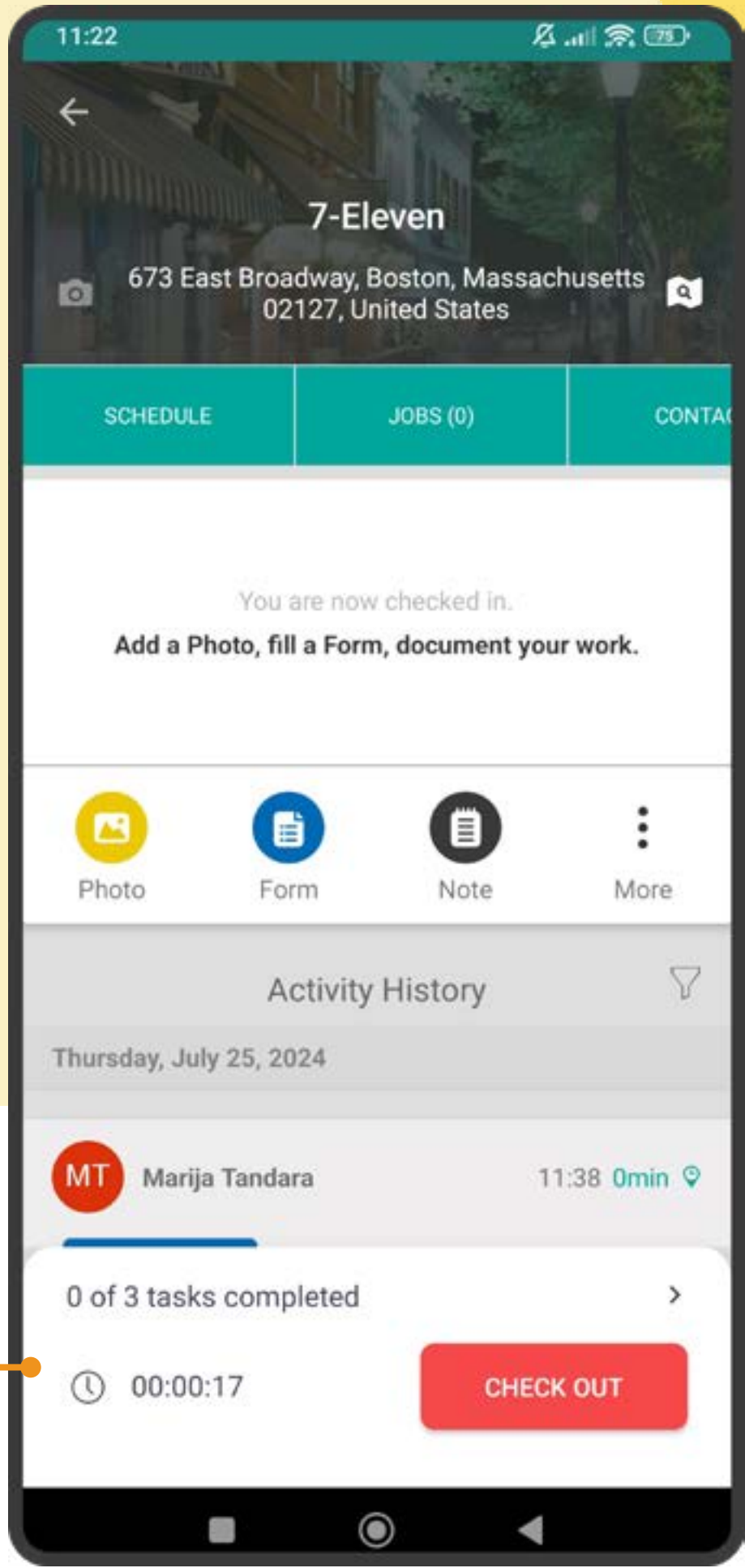
HOW TO SEE YOUR MANDATORY TASKS FOR THE DAY

To complete a visit, all assigned tasks must be finished before you check out. The Schedule feature shows your daily visits and tasks, and once checked in, the app guides you through what needs to be done.

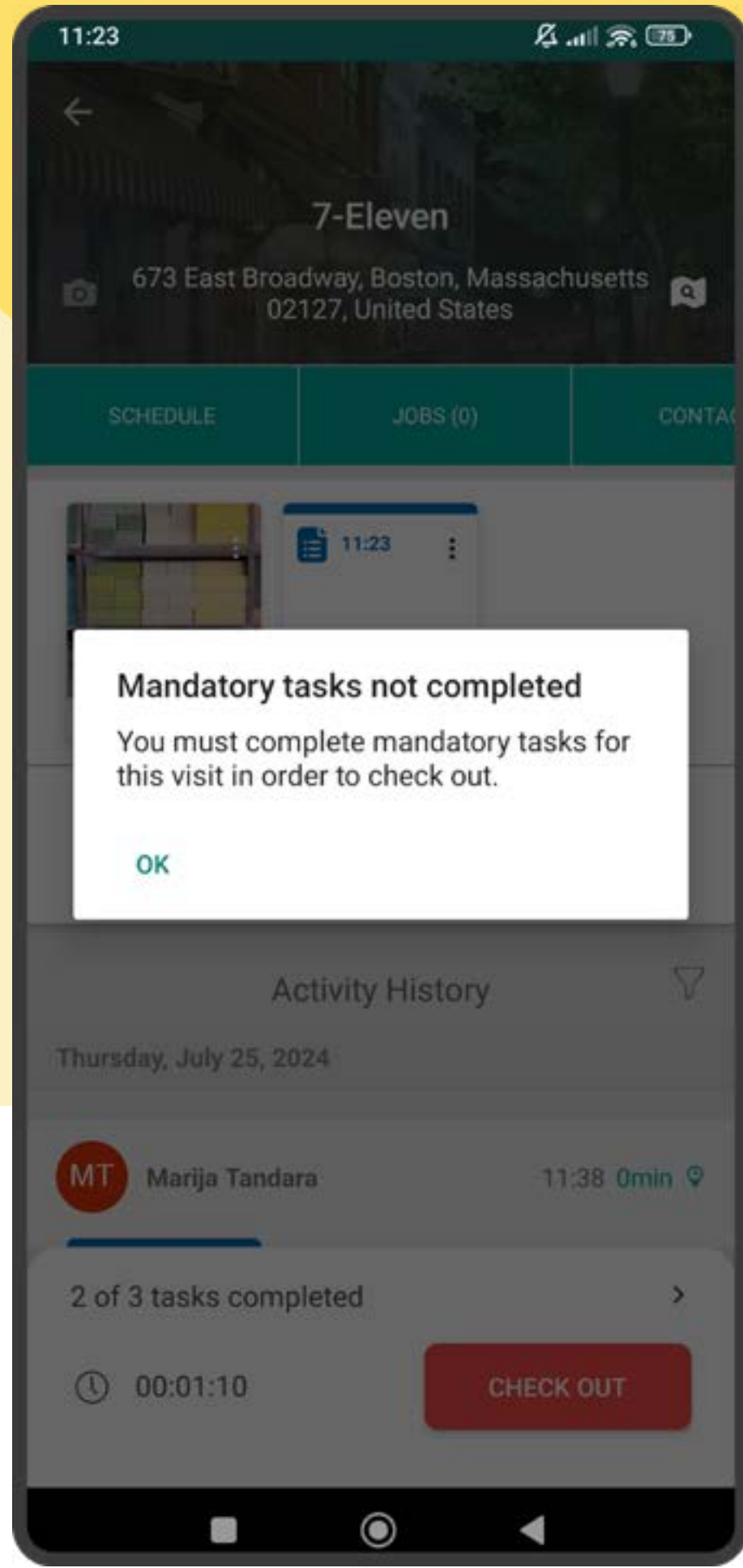
1 Tap on **SCHEDULE**, and select the visit. You can also view tasks in advance to stay prepared.



2 Once you check in, the Repls app will display the number of mandatory tasks you need to complete at that location.



3 You won't be able to check out until all mandatory tasks are completed.



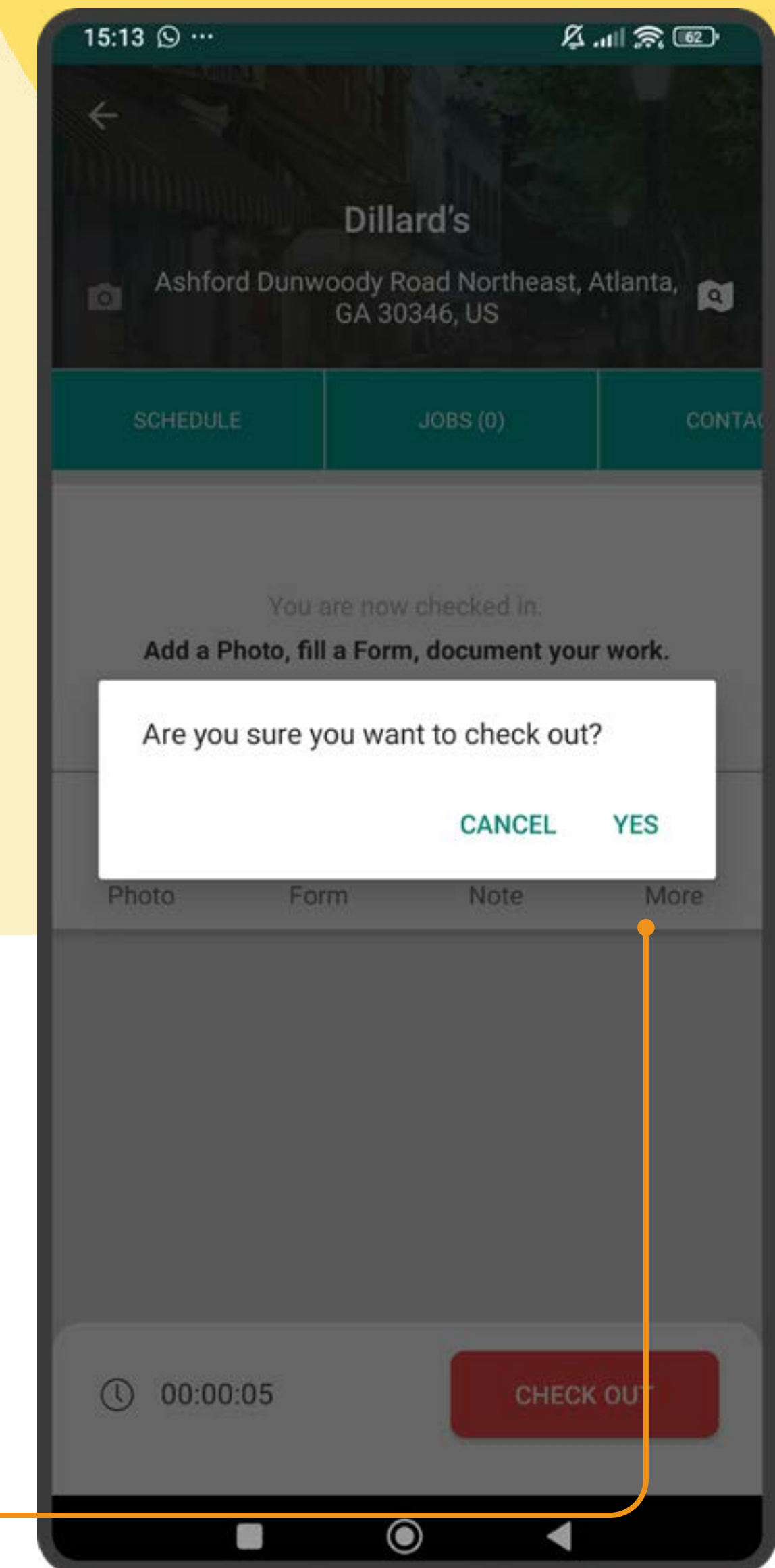
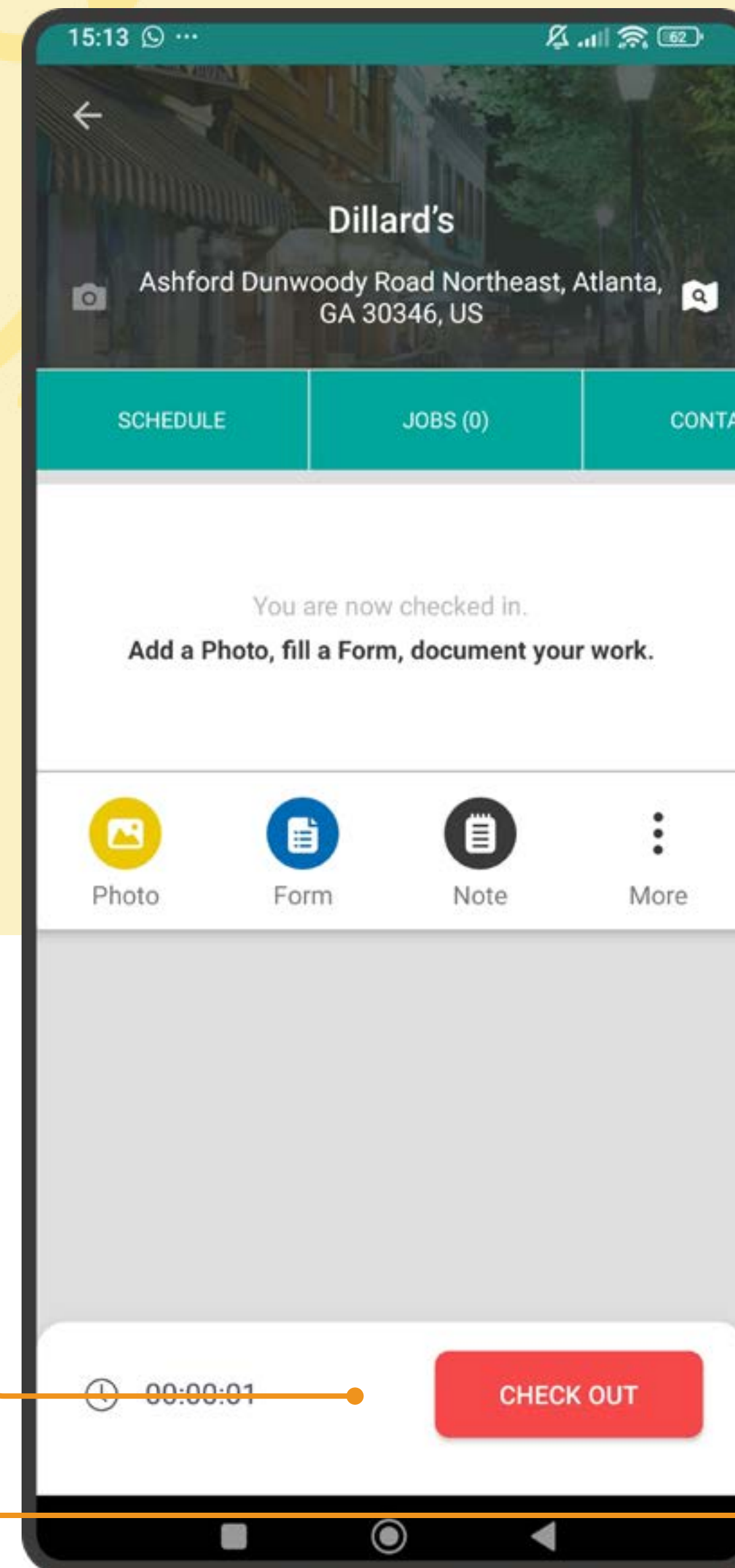
12

HOW TO CHECK OUT

Once you've completed all the tasks during a store visit, you'll need to check out to signify the visit is done and stop the visit clock.

NOTE: If you don't check out from a store, you will see a red dot at the Places icon that will remind you that you're still checked in.

- 1 Tap on the **CHECK OUT** button at the bottom of your screen.
- 2 Tap **YES** to confirm you want to be check out.

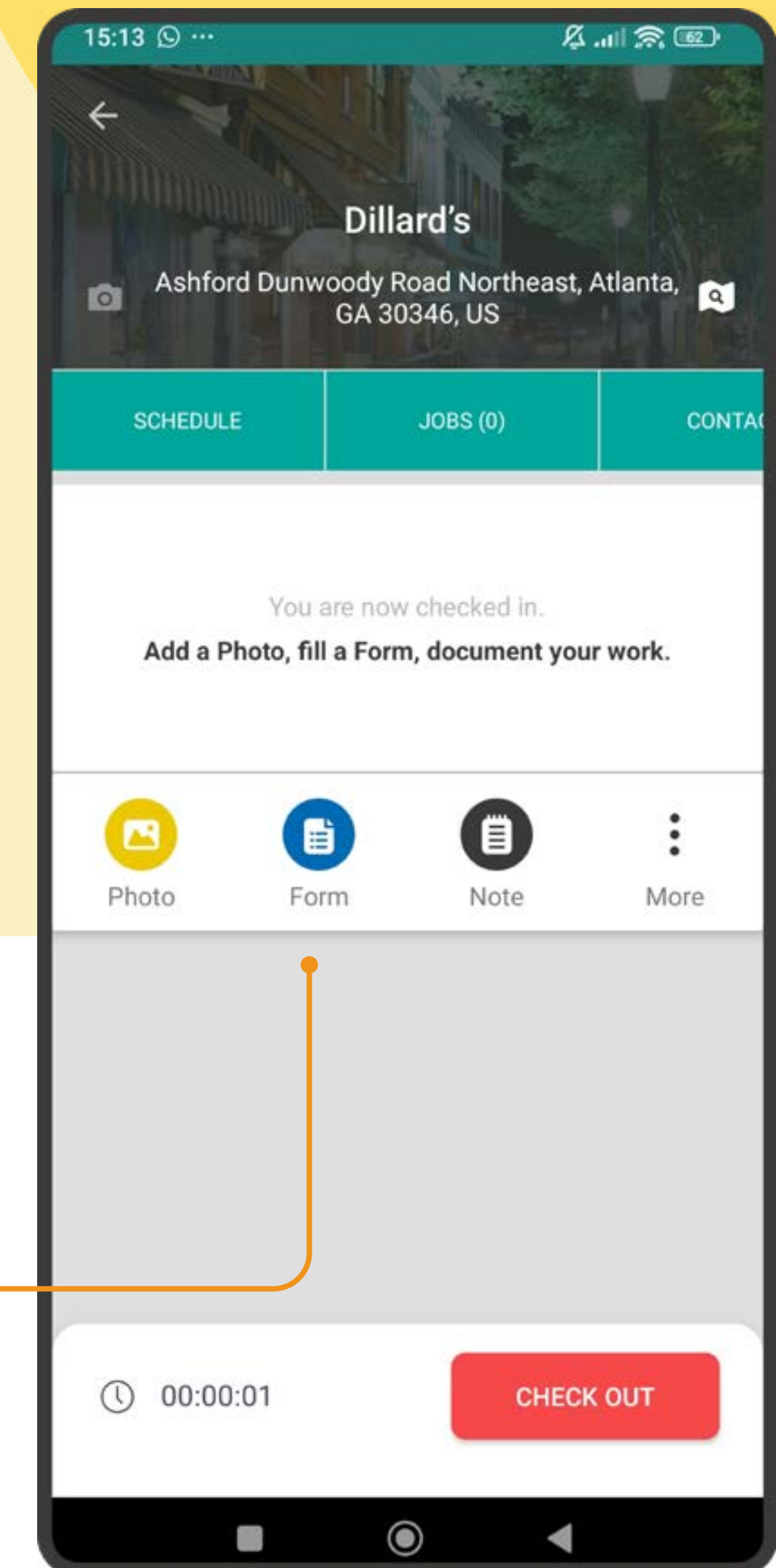
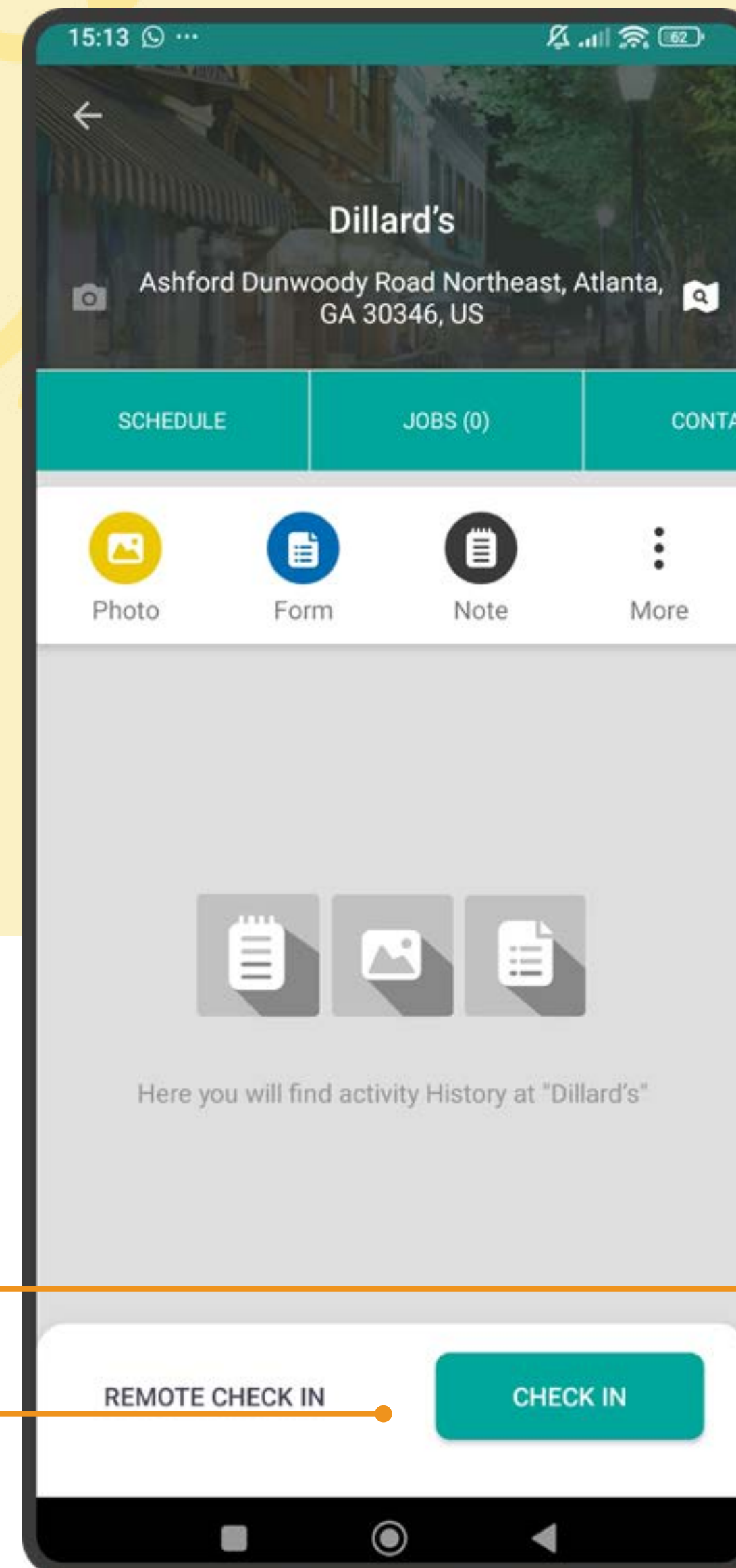


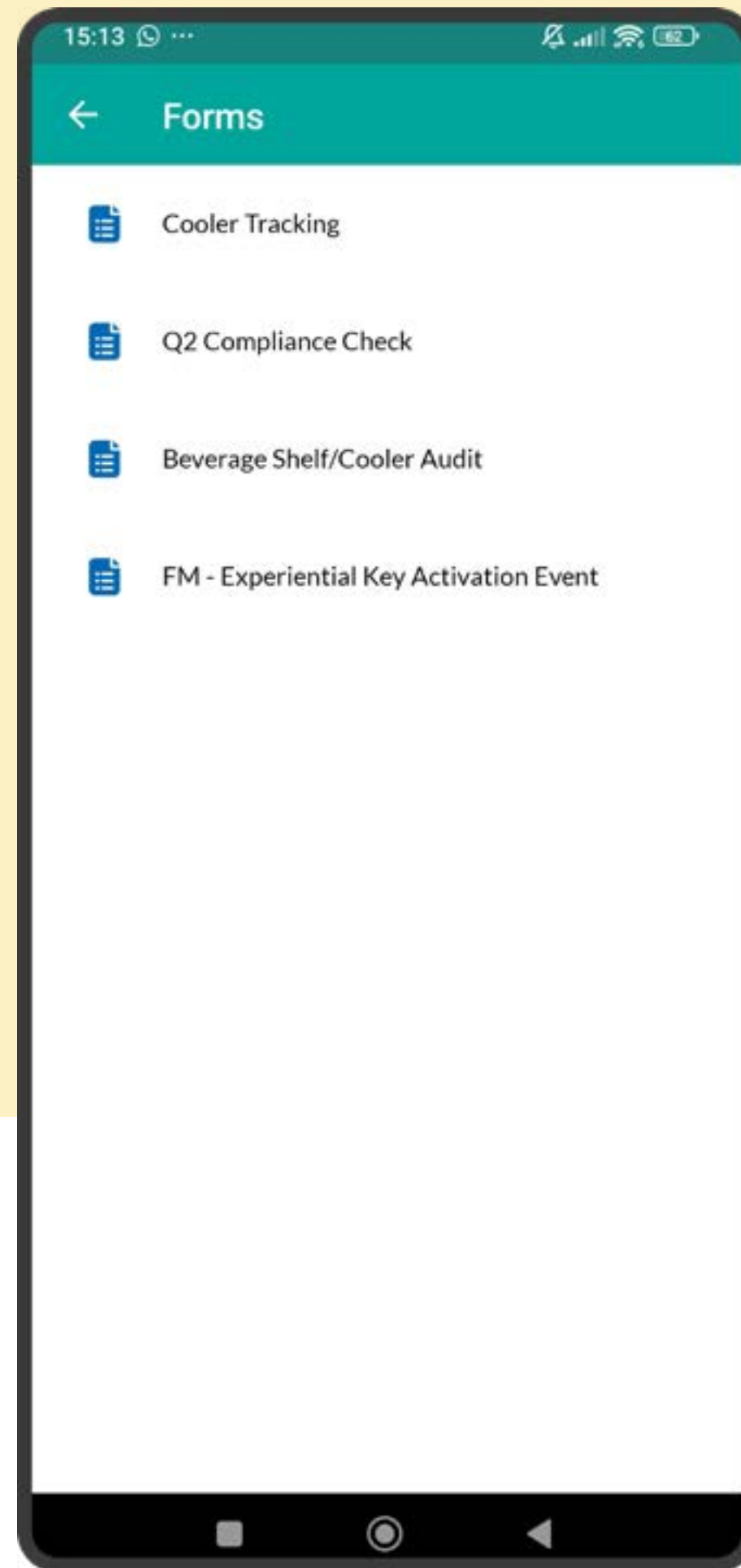
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HOW TO FILL OUT A FORM

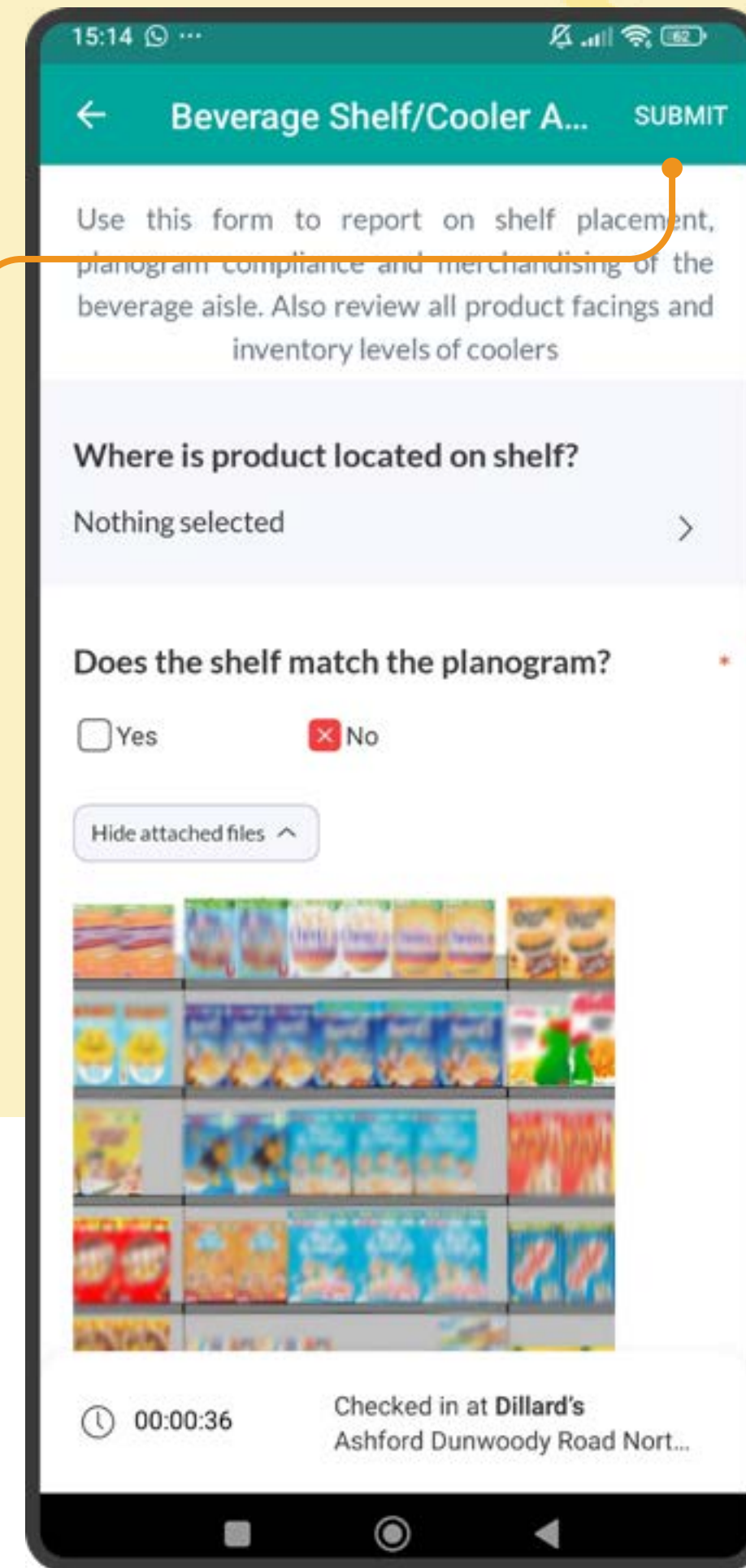
Forms are the perfect way for you to capture data and store-level insights.

- 1 Choose the place for which you wish to fill out the form from your list of places.
- 2 Tap on the **CHECK IN** icon and select the **FORM** option.

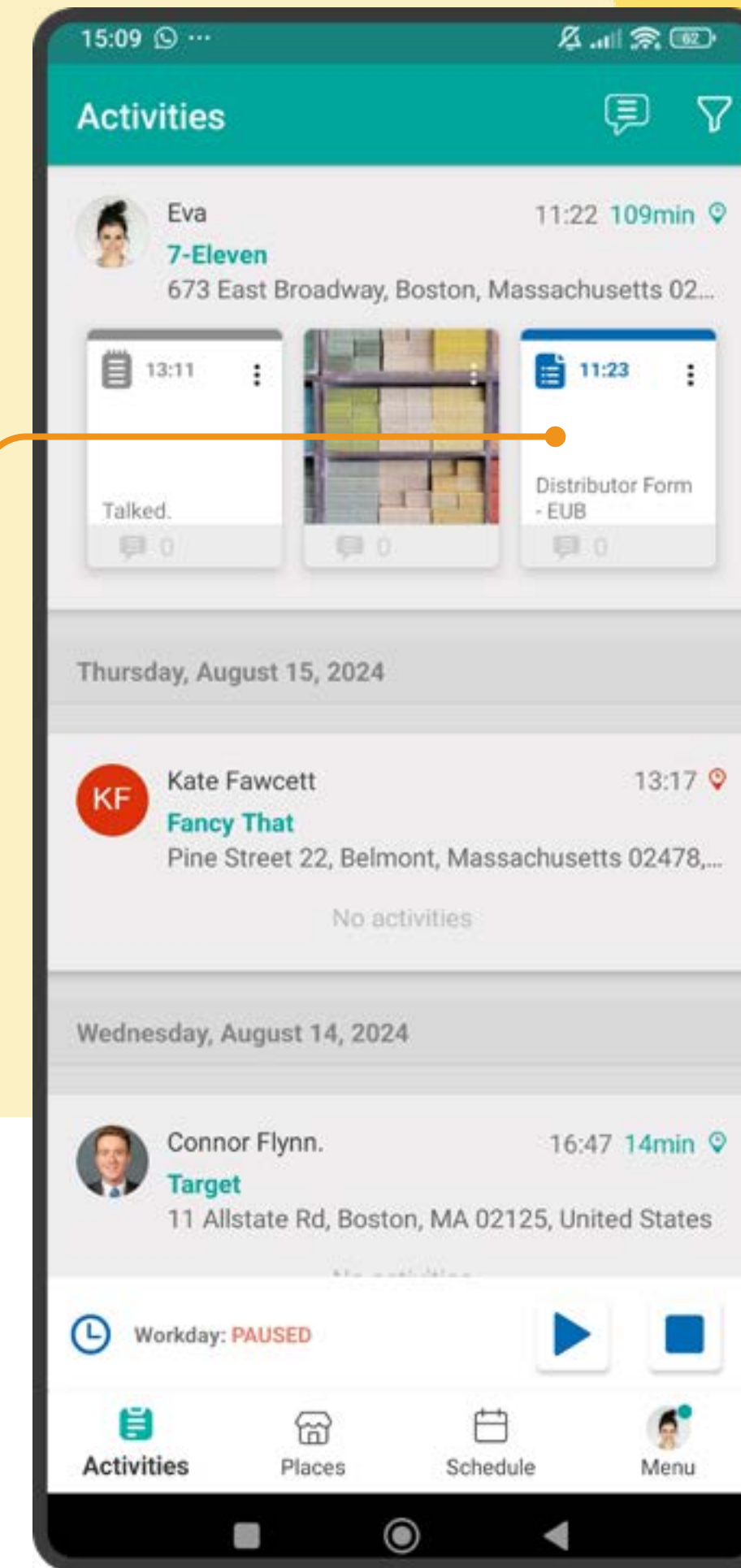




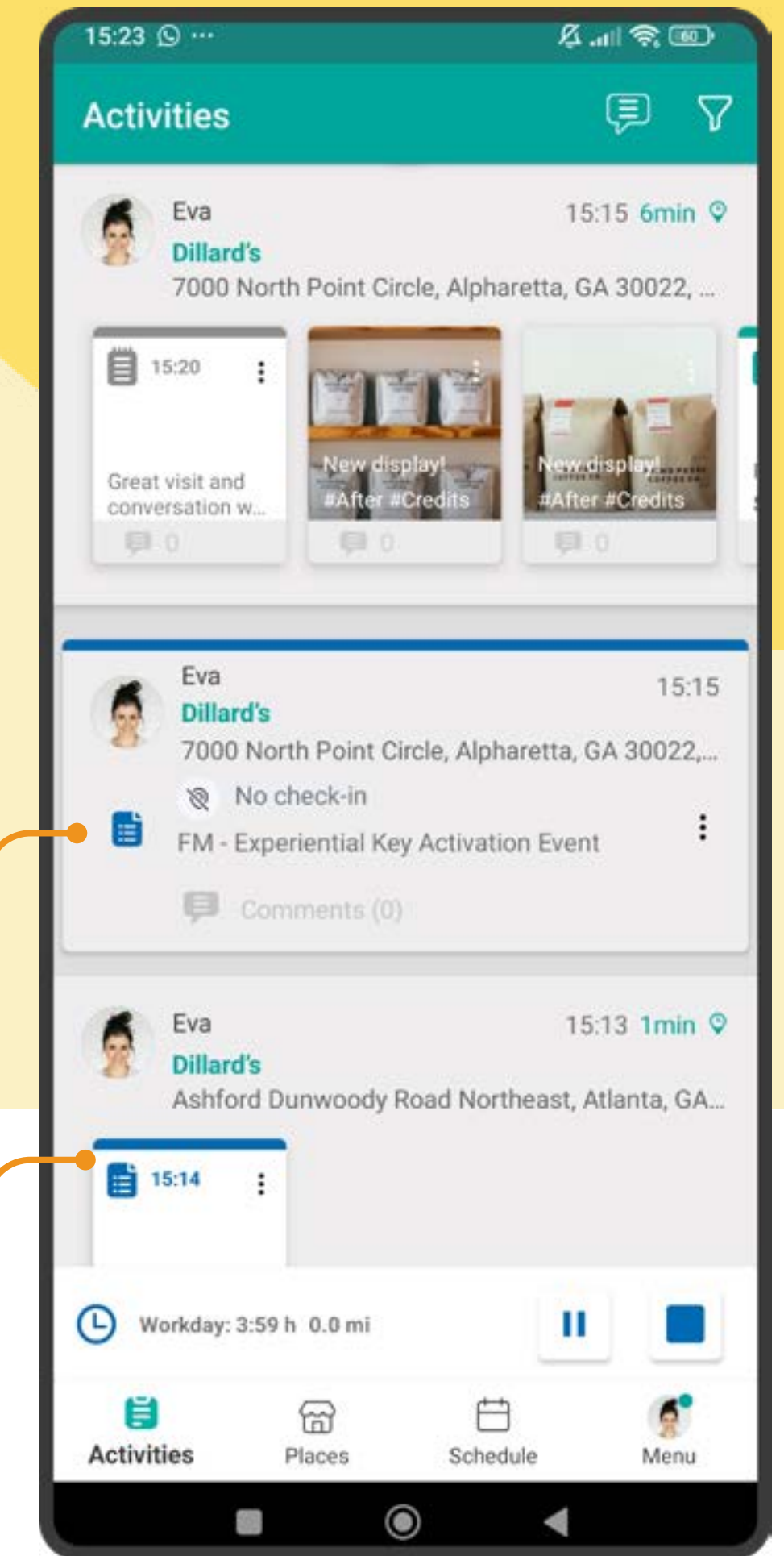
3 Choose the appropriate form.



4 Fill out all the necessary fields on the form. Tap **SUBMIT** when you're finished. To email the form, select **SUBMIT** and then **SUBMIT AND SEND BY EMAIL** in the pop-up window.



5 You'll now be able to see the completed form on the Activities page.

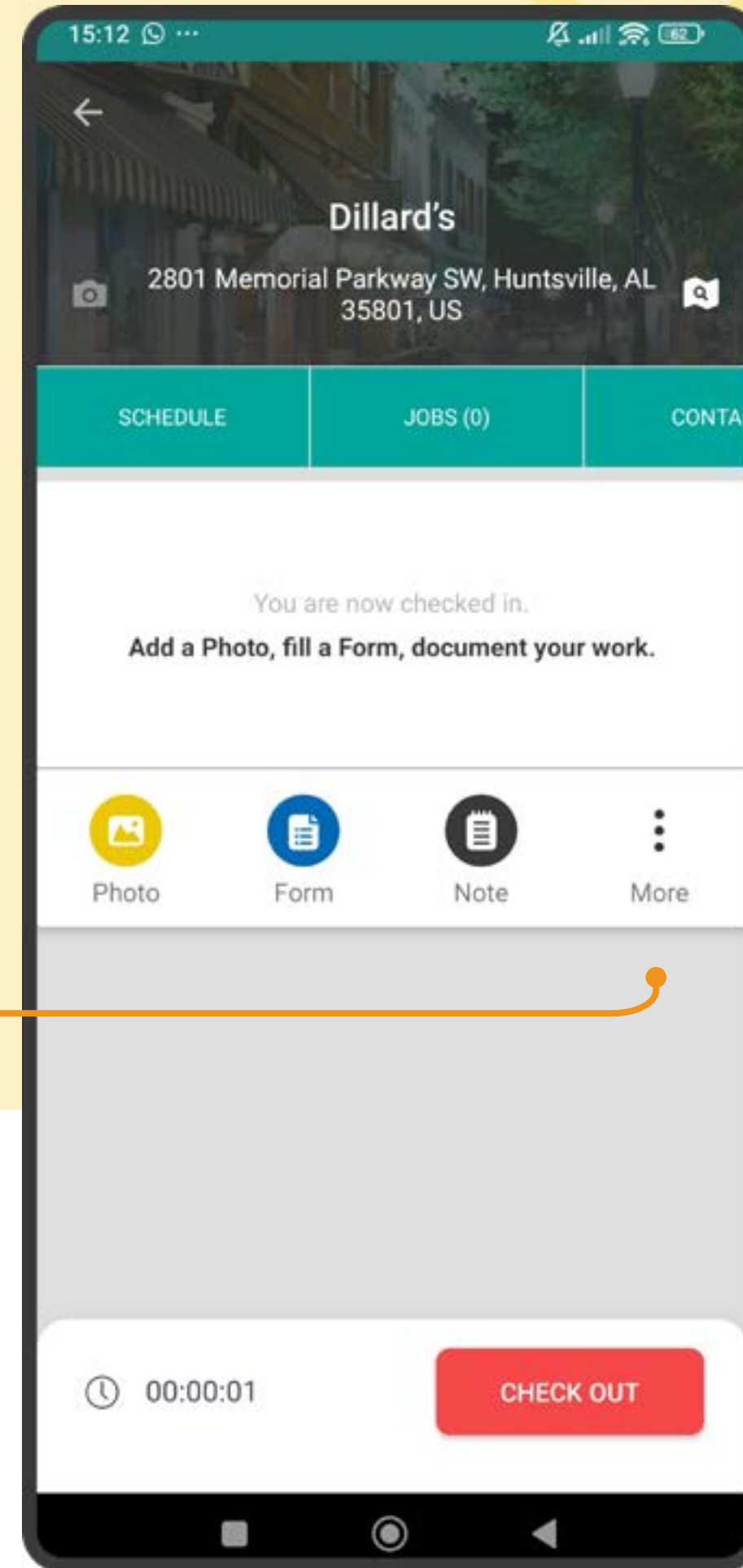


6 The **No check in** indicator shows when Forms are submitted without checking in to the place.

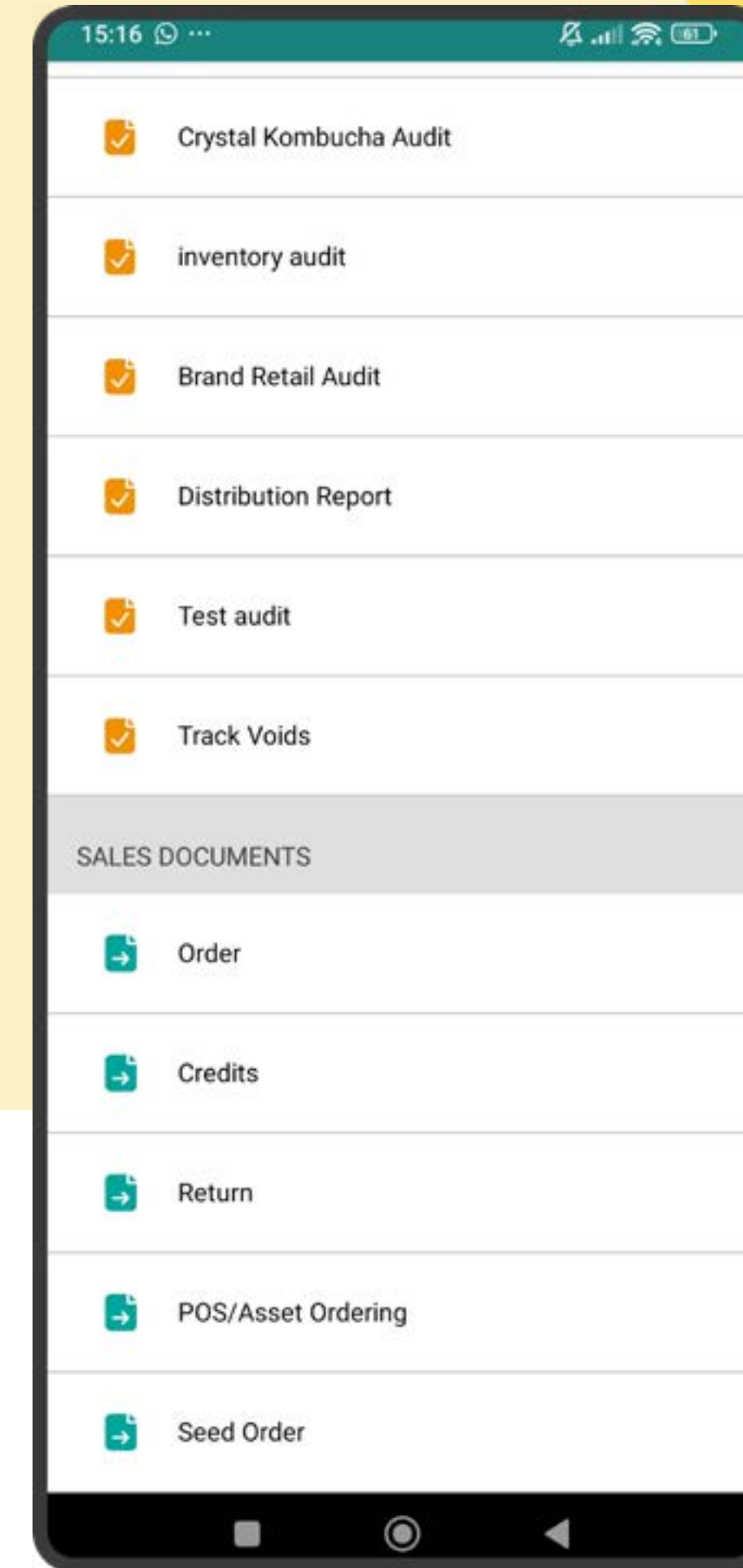
14

HOW TO FILL OUT A RETAIL AUDIT

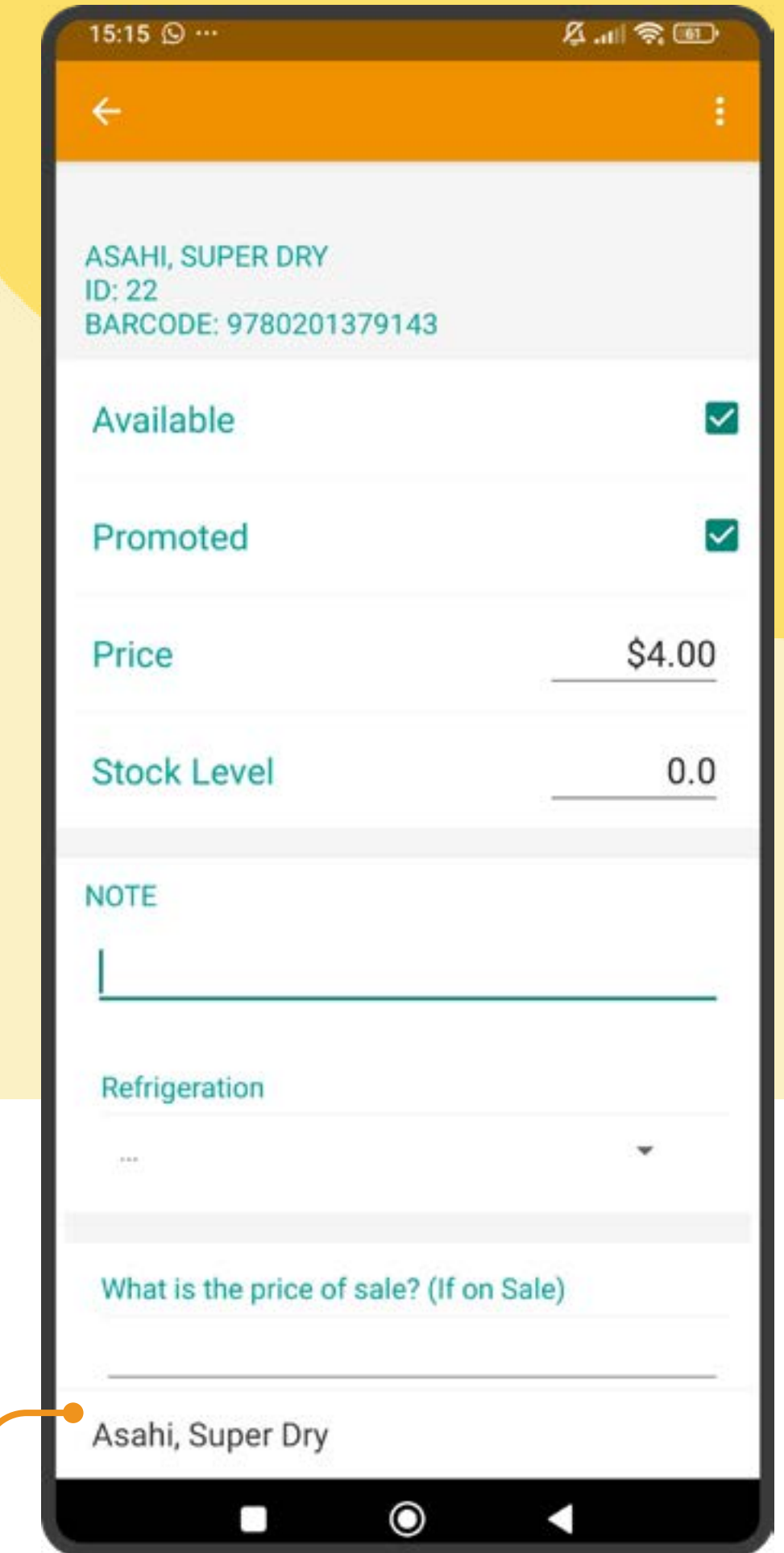
Retail Audits are surveys that allow you to capture real-time data on products and drive compliance at every visit.



- 1 Tap the **PLACES** tab and select the place. Select **THREE DOTS** when checked into a place.



- 2 Choose the appropriate **AUDIT**. Use the barcode scanner to quickly find and select a product from your catalog.



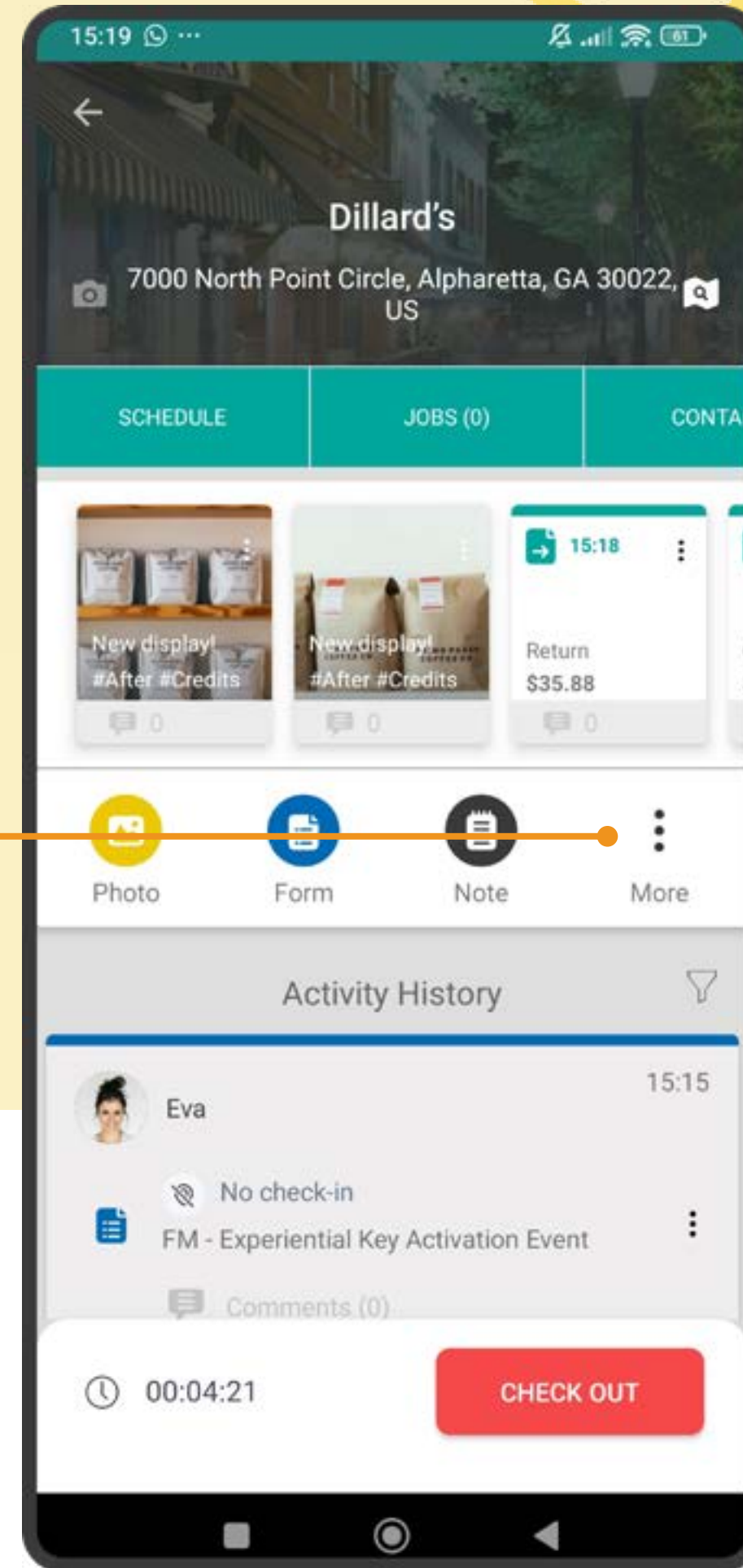
- 3 Complete the necessary fields, and tap **scan next item** to quickly move to the next product. Tap **SUBMIT** when you're finished.

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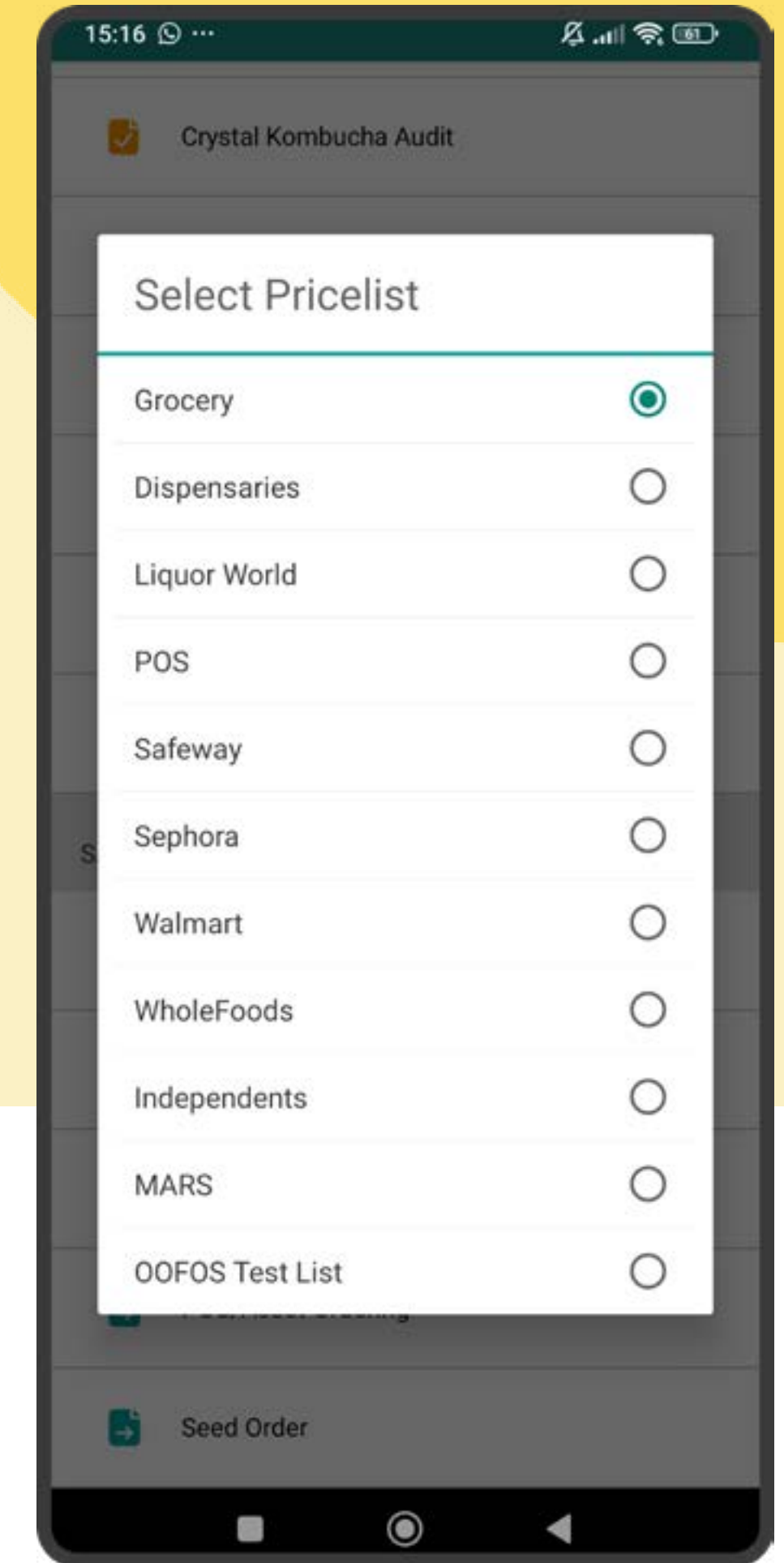
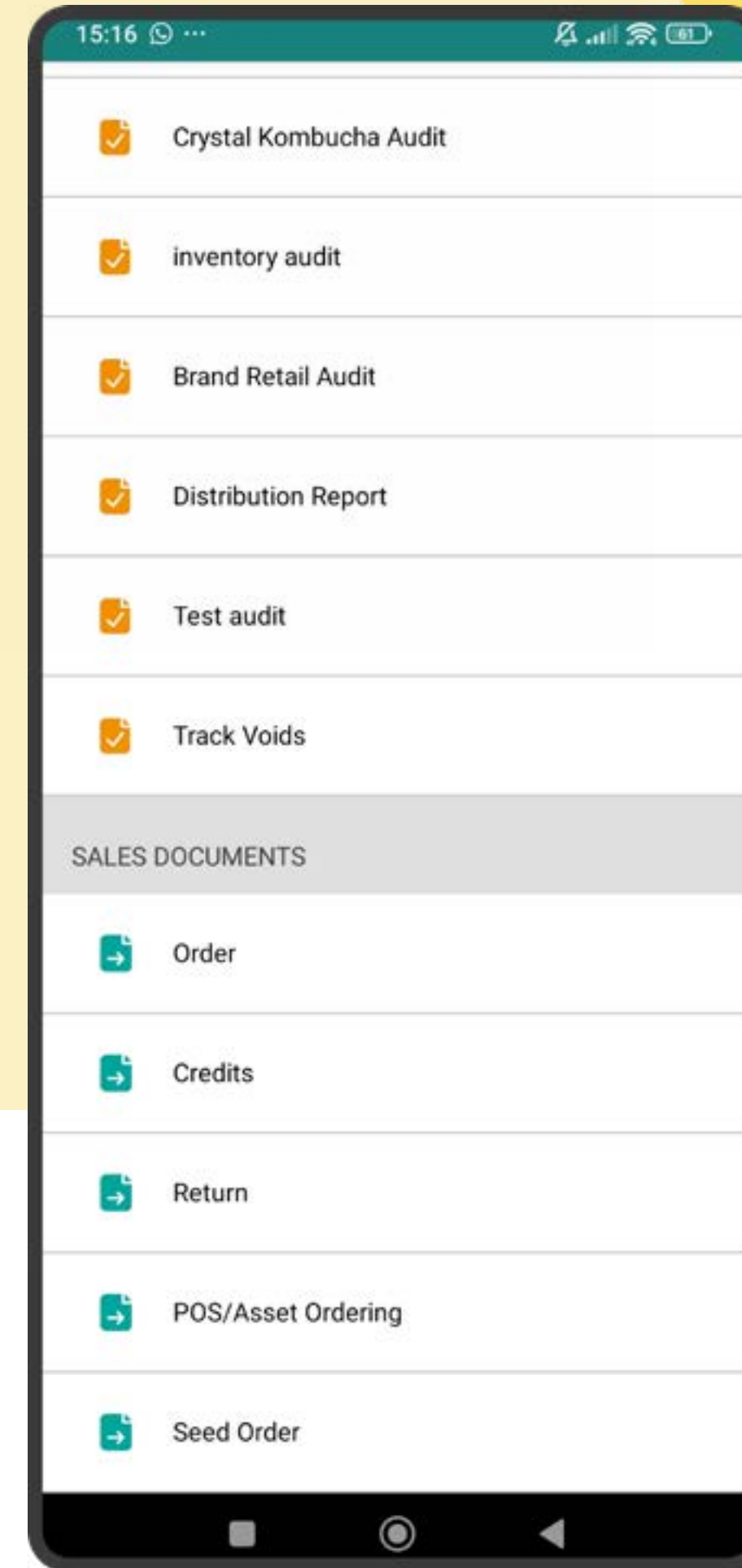
HOW TO PLACE AN ORDER

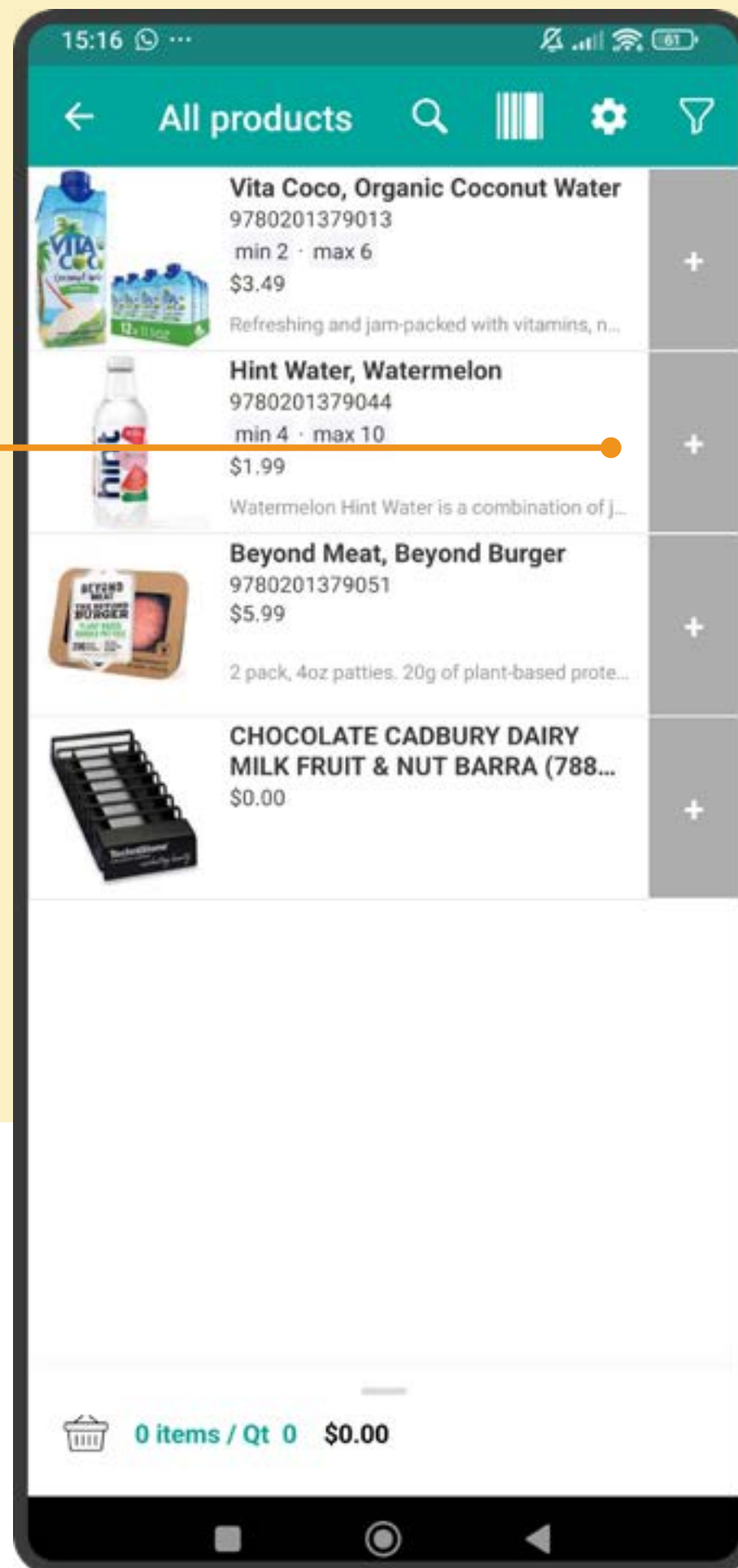
Sales Documents make it easy to complete fast, accurate purchase orders right from the store.

- 1 Tap the **PLACES** tab and select the place. Select **THREE DOTS** when checked into a place.

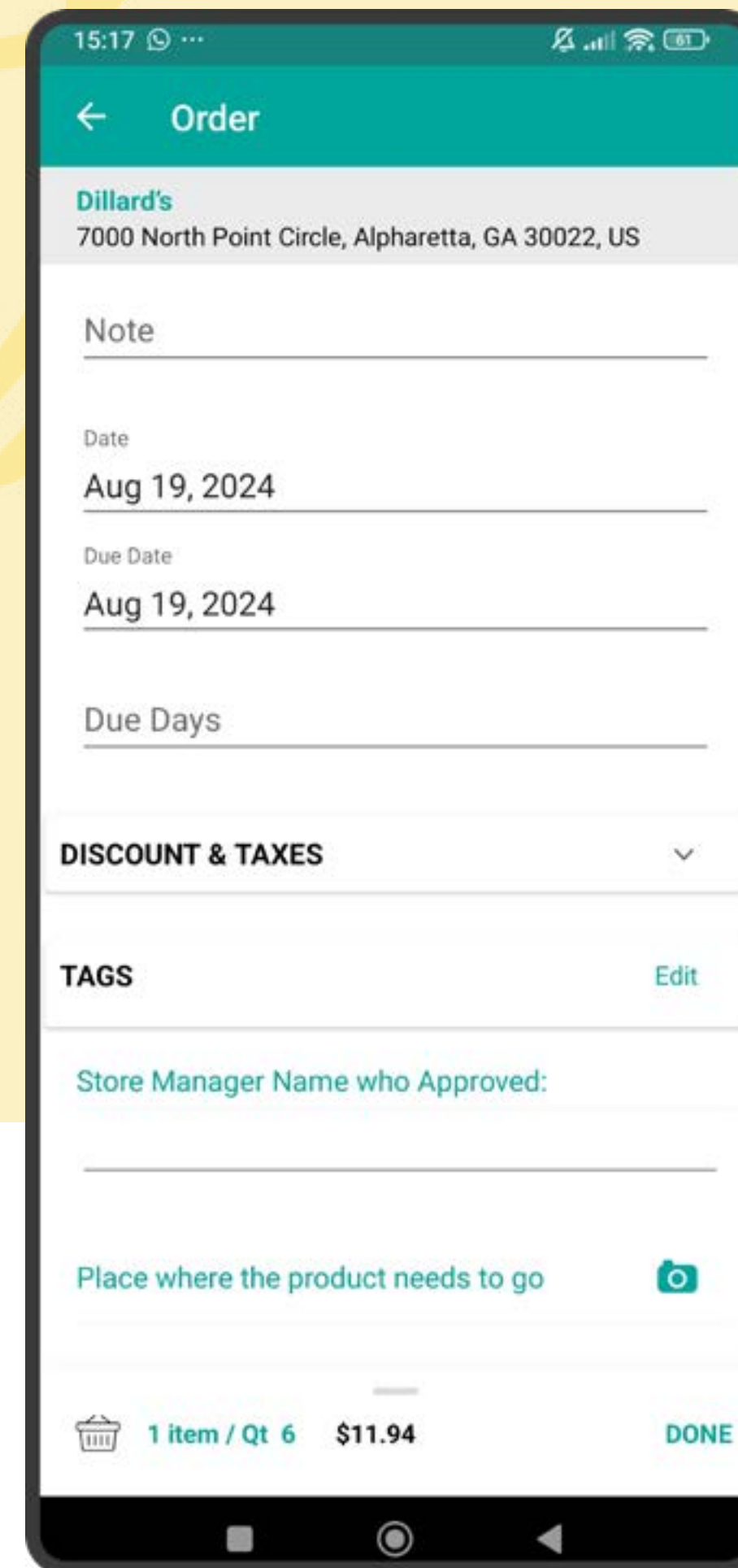


- 2 Tap on the **ORDER** and select a pricelist to view a list of products. You can search for products, scan their barcode, or manually search for their **SKU**. Tap on the product name to view more details, like image, last order date, and more.

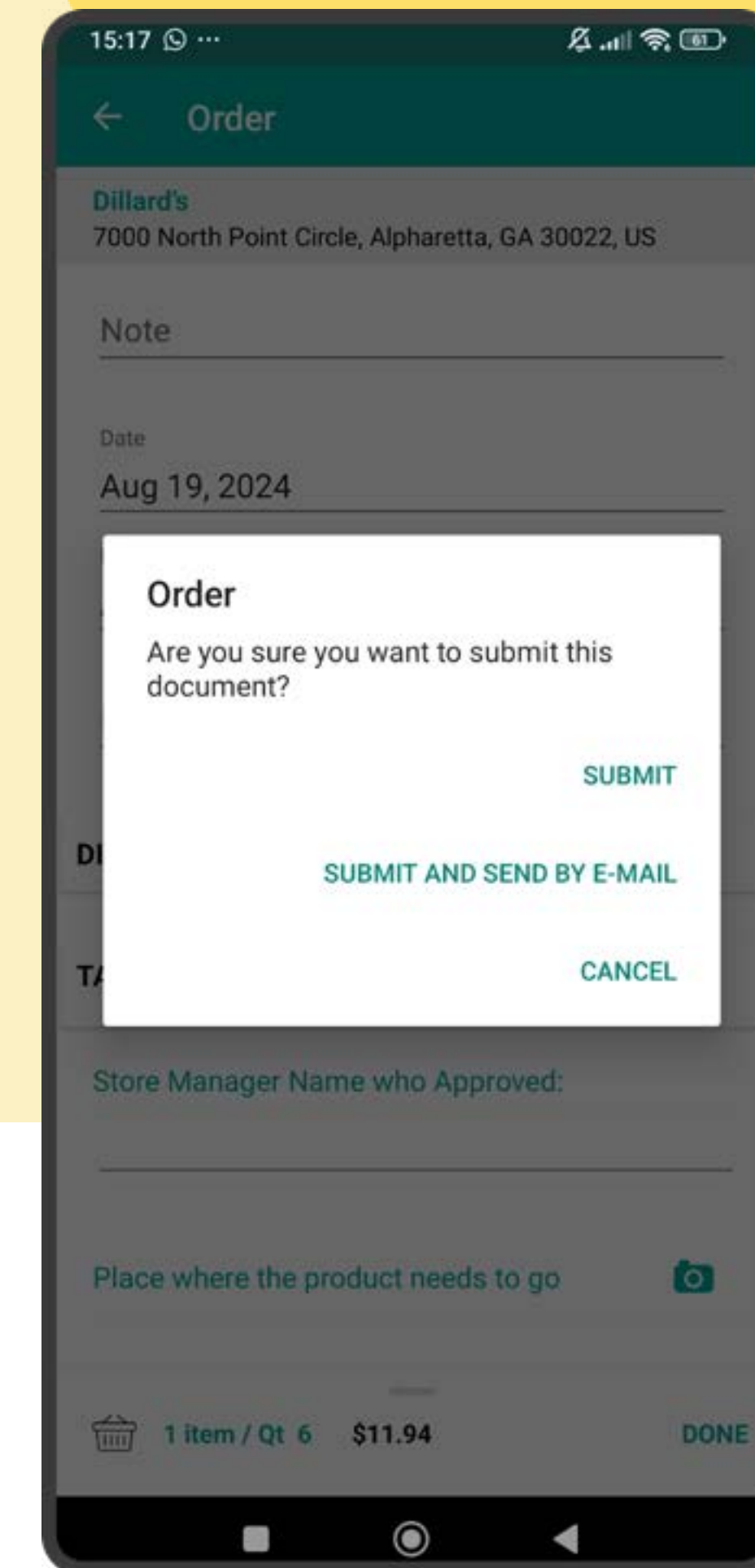




3 To add products to your order, tap on the **+ BUTTON** to add that product to your cart.



4 Once you have added all items to your cart, you'll be prompted to confirm a few details before submitting your order.

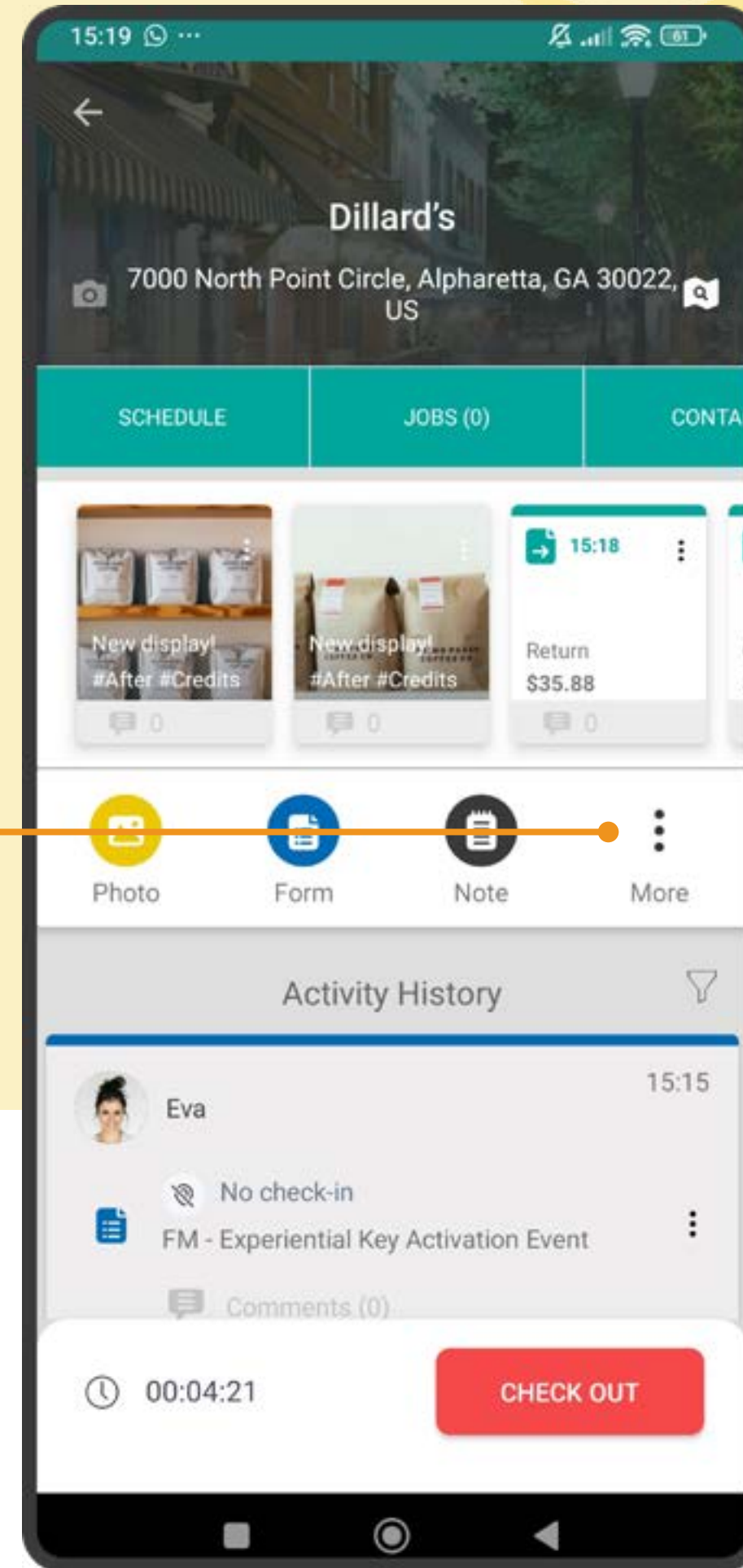


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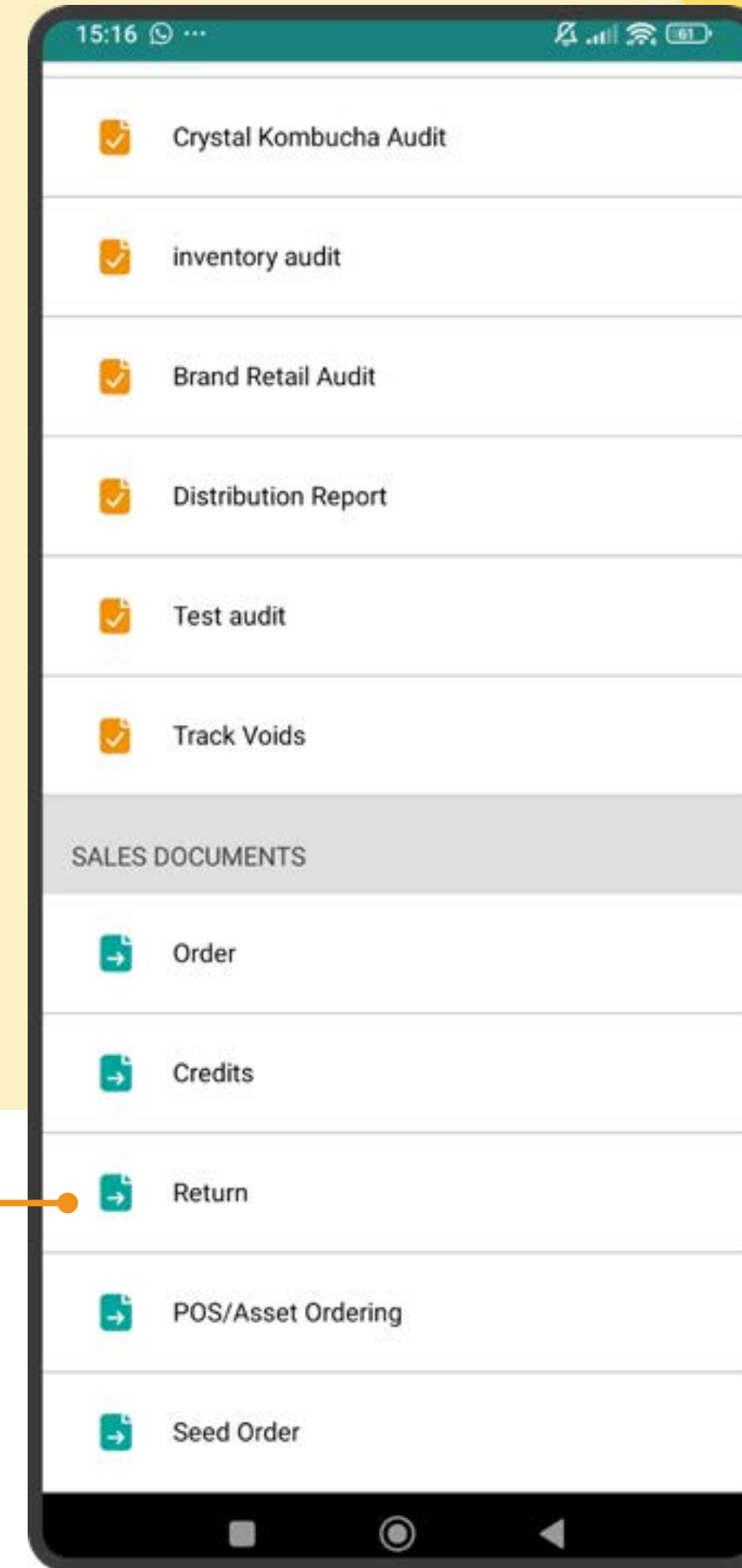
HOW TO PLACE RETURN

Some teams also need to accept returns in the store. This workflow is very similar to the process for placing a new order.

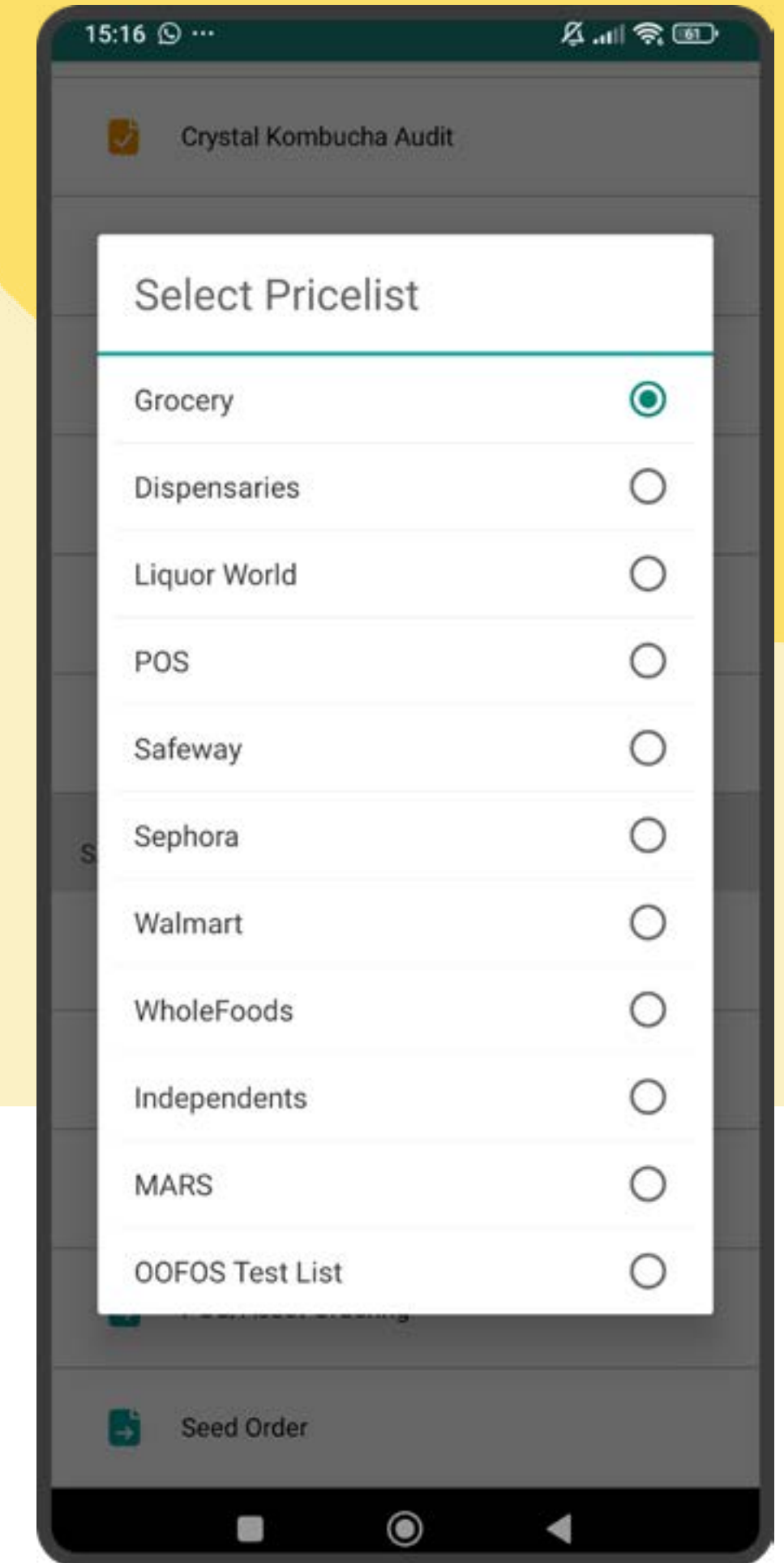
1 Tap the **PLACES** tab and select the place. Select **THREE DOTS** when checked into a place.

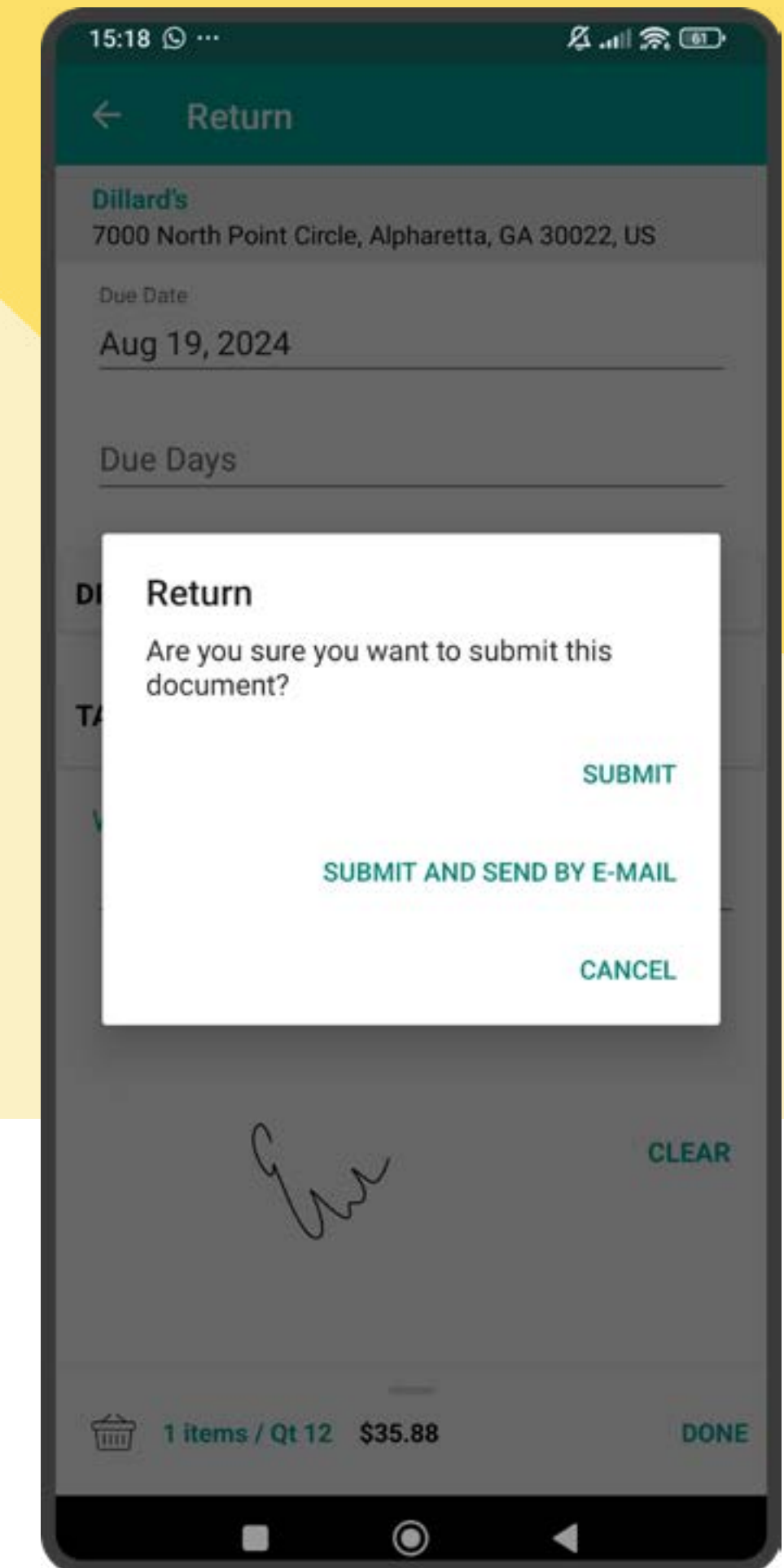
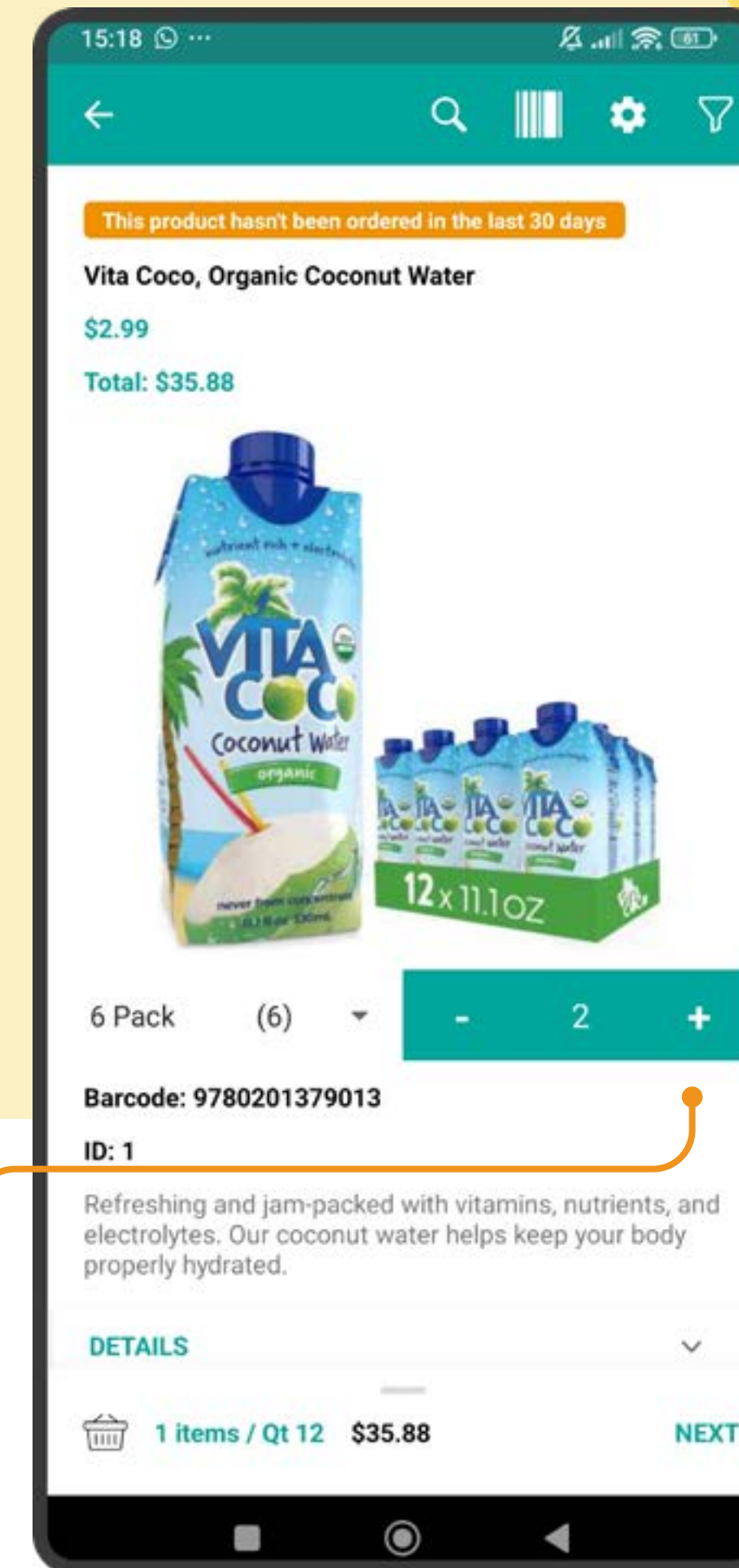
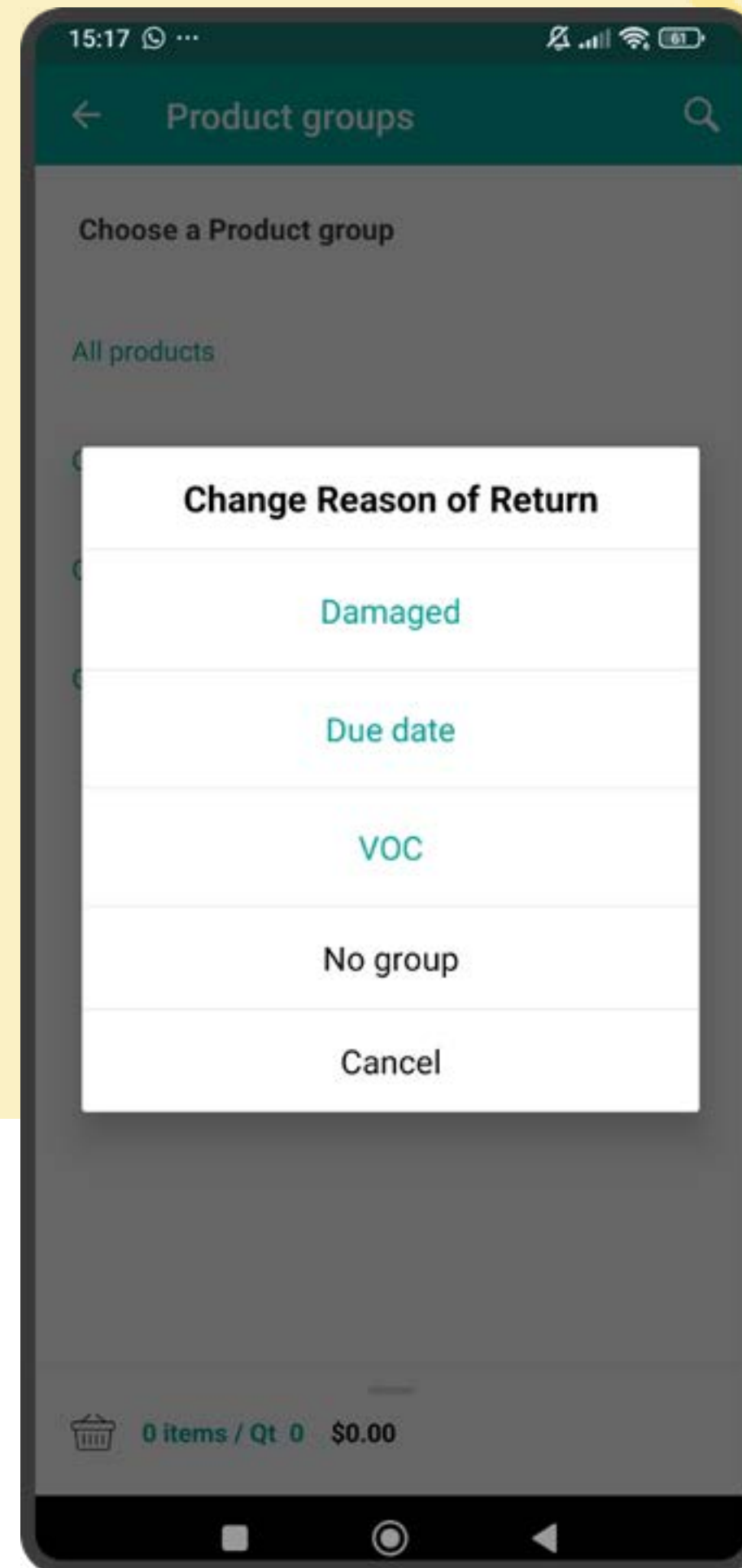
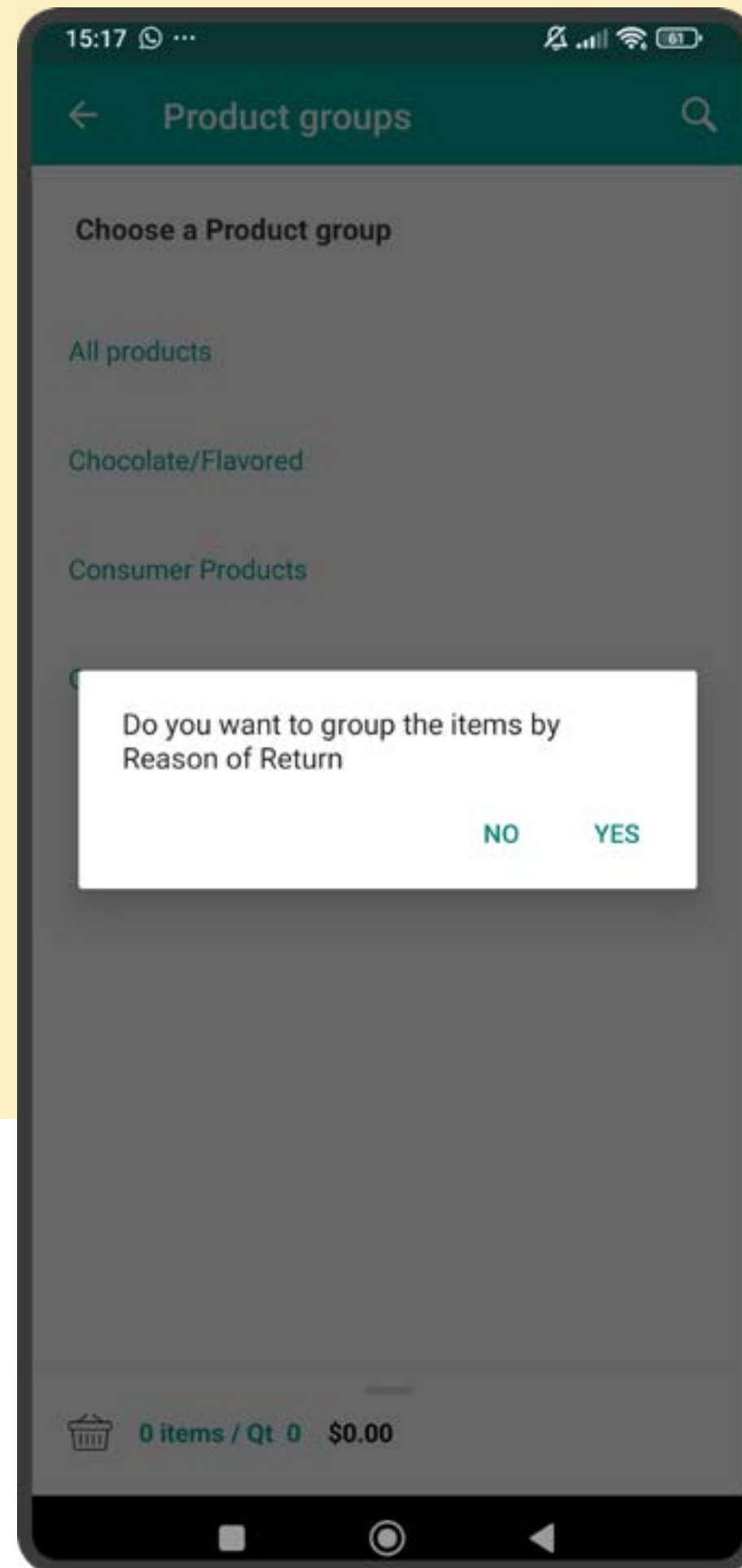


2 Tap on the appropriate **RETURN**.



3 Select a pricelist.





4 Now choose if you want to group the items by **Reason for return**. If you click **YES**, you'll be prompted to select from a list of suggested reasons.

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

6 After adding all items to your cart, you'll need to confirm a few details before submitting your return.

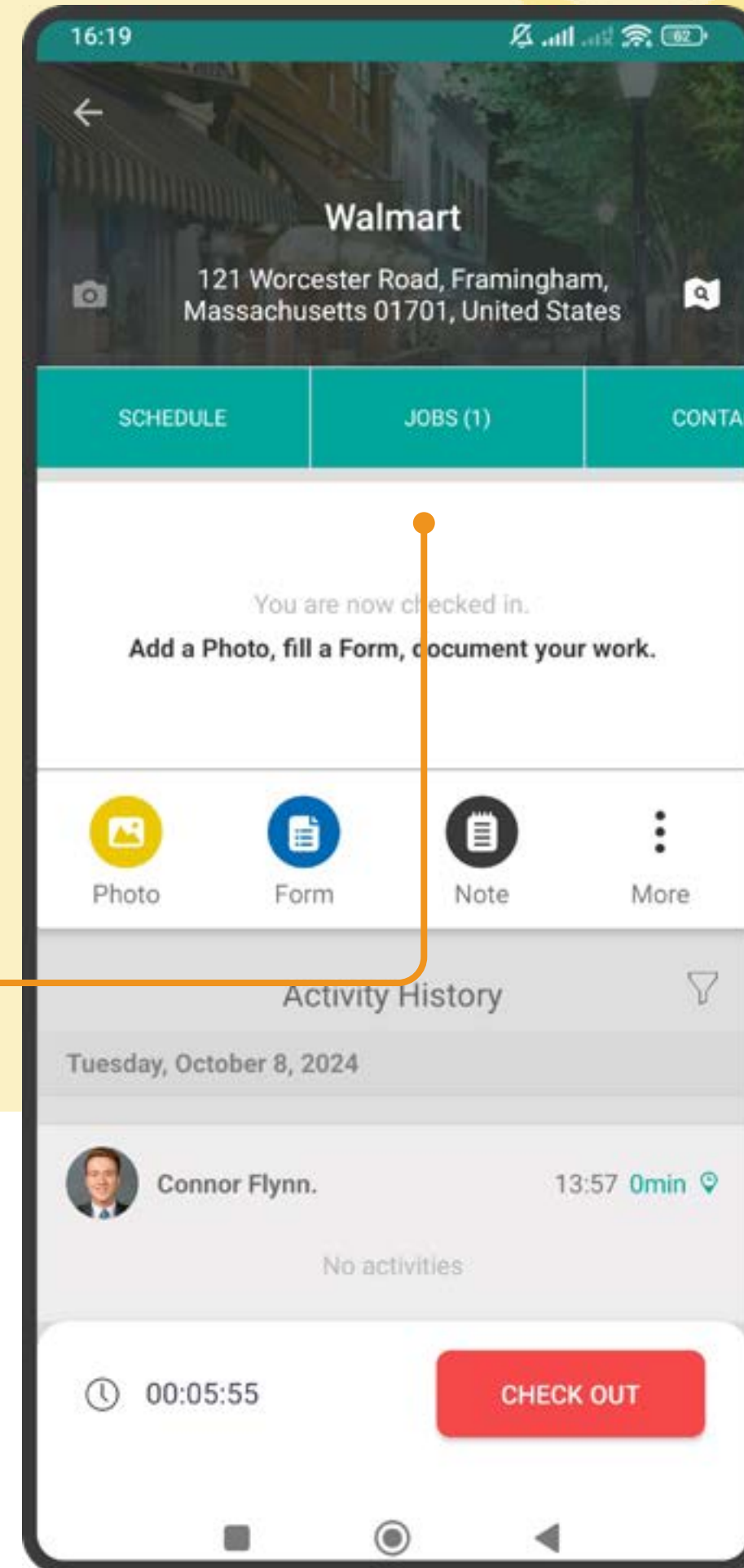
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HOW TO CLAIM AND EXECUTE JOBS

Jobs help reps manage tasks more efficiently. With flexible scheduling and a Job Board for reps to claim and finish work, teams can quickly adapt to changes in the field.

1

To claim a job, click on **JOBS** in the Place tab. This will open the **VISIT DETAILS**.



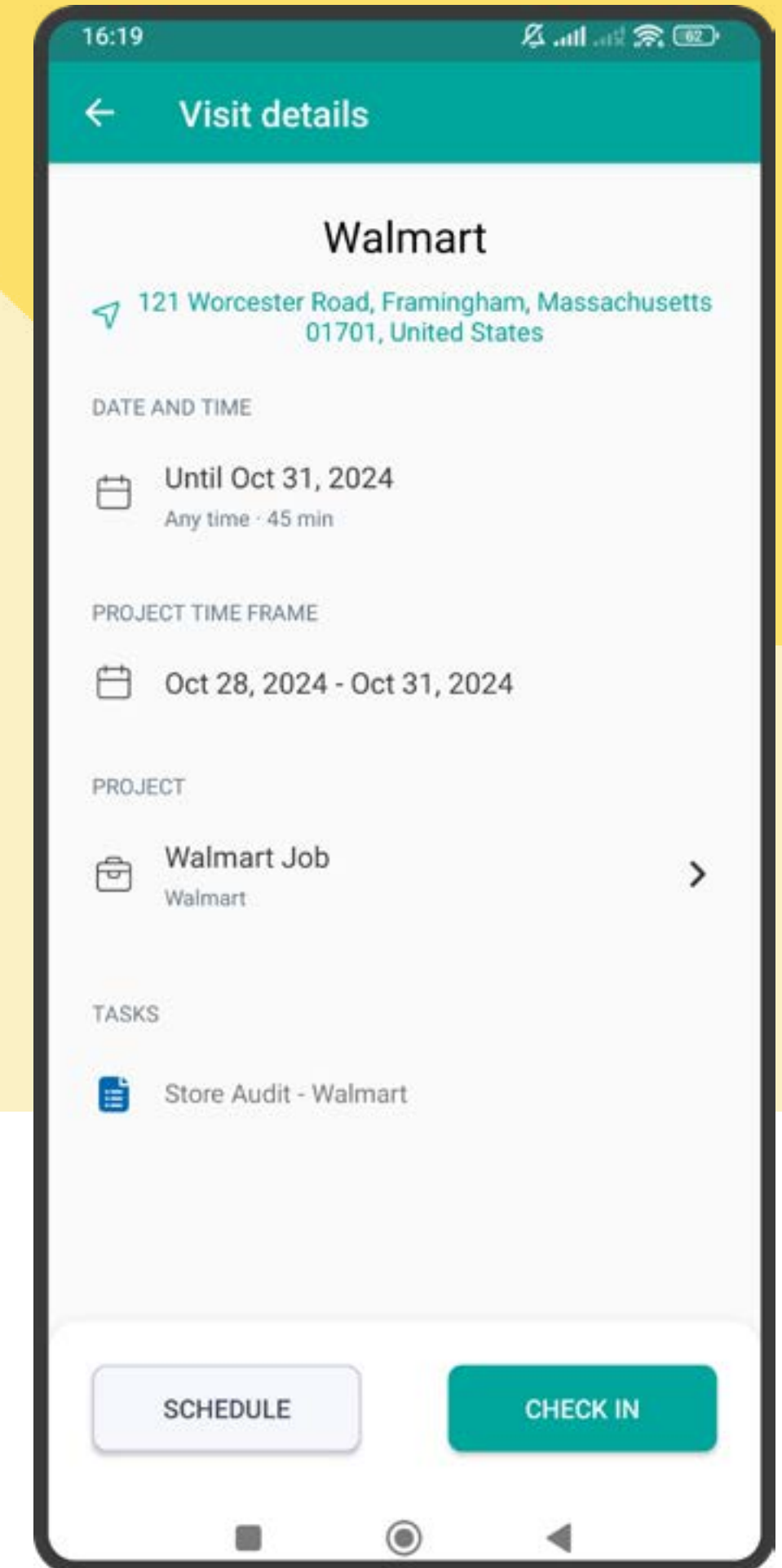
2

In the next step, reps can view all available jobs at the location, including details on expected pay, required materials, and tasks.



3

If the job can be done immediately, a **CHECK IN** button will appear to claim the job and start the visit. For jobs scheduled for a later date, reps can select the option to schedule the visit.



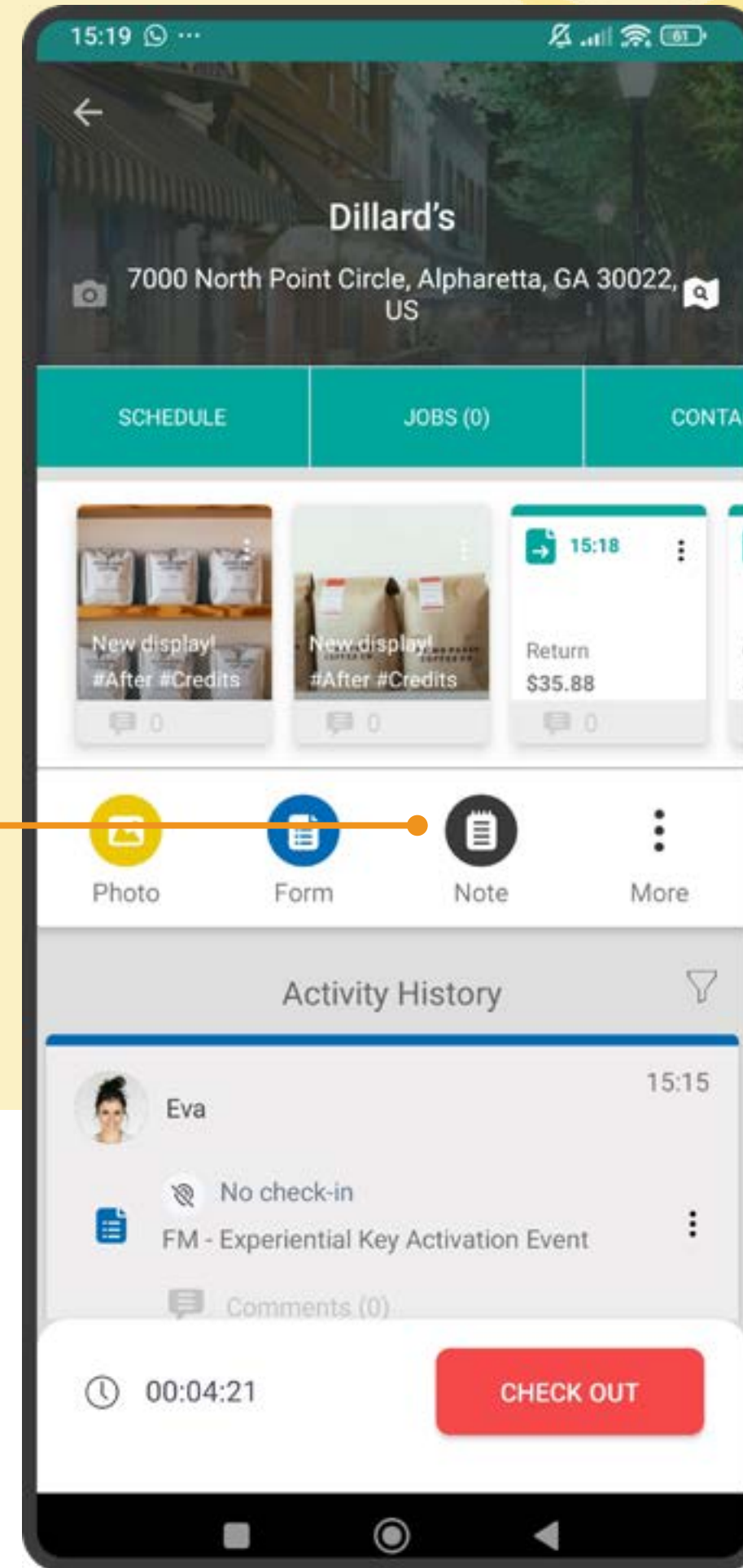
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HOW TO SUBMIT A NOTE

Use notes to capture observations or follow-ups during a store visit. Notes are handy to refer back to so you can quickly get caught up on what recently happened at a place.

1

Check in to a place, then tap on the **NOTE** button.



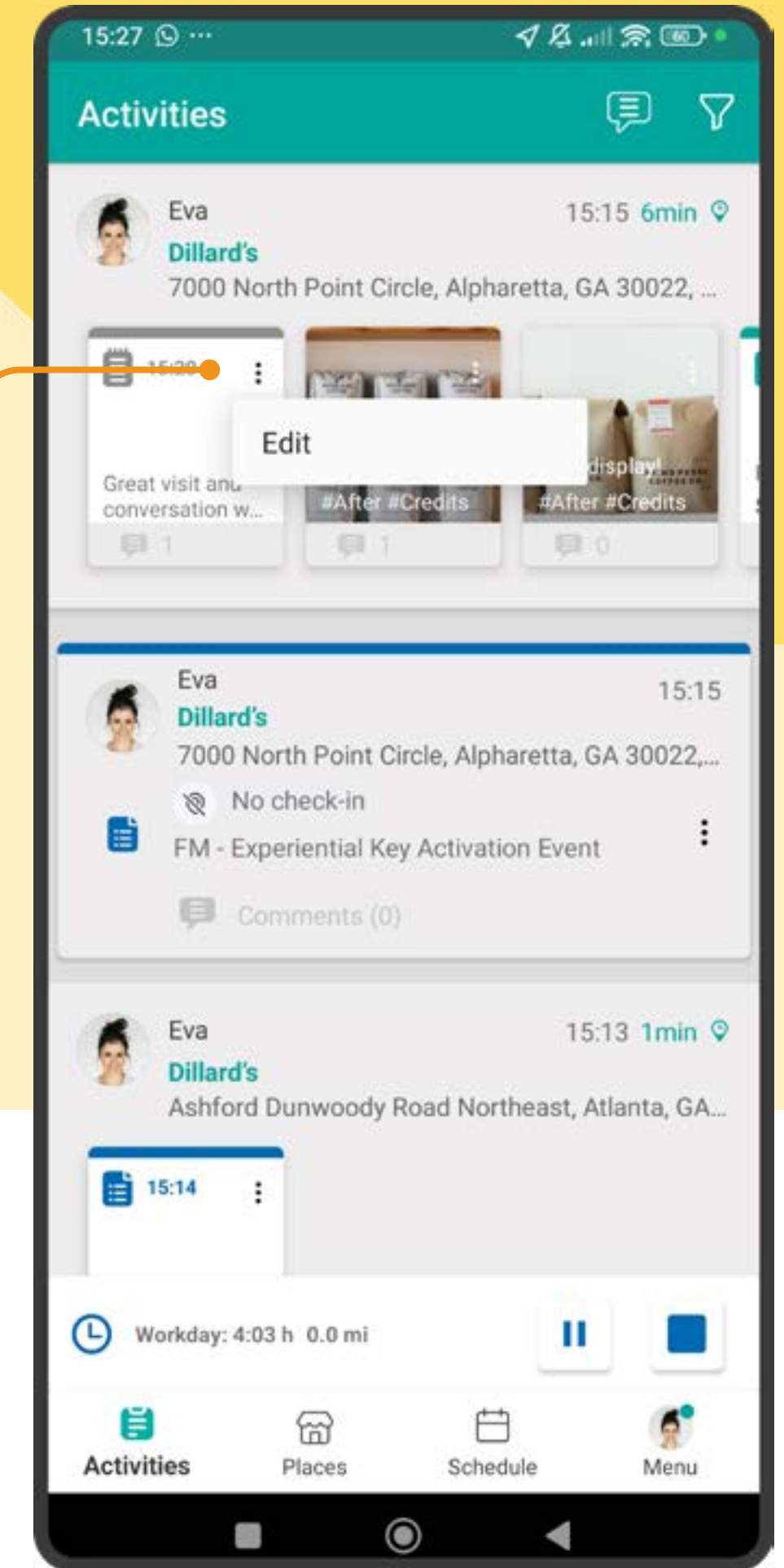
2

Write your note and tap **SUBMIT** to save.



3

You can also edit your submitted notes by clicking on the three dots and selecting **EDIT**.



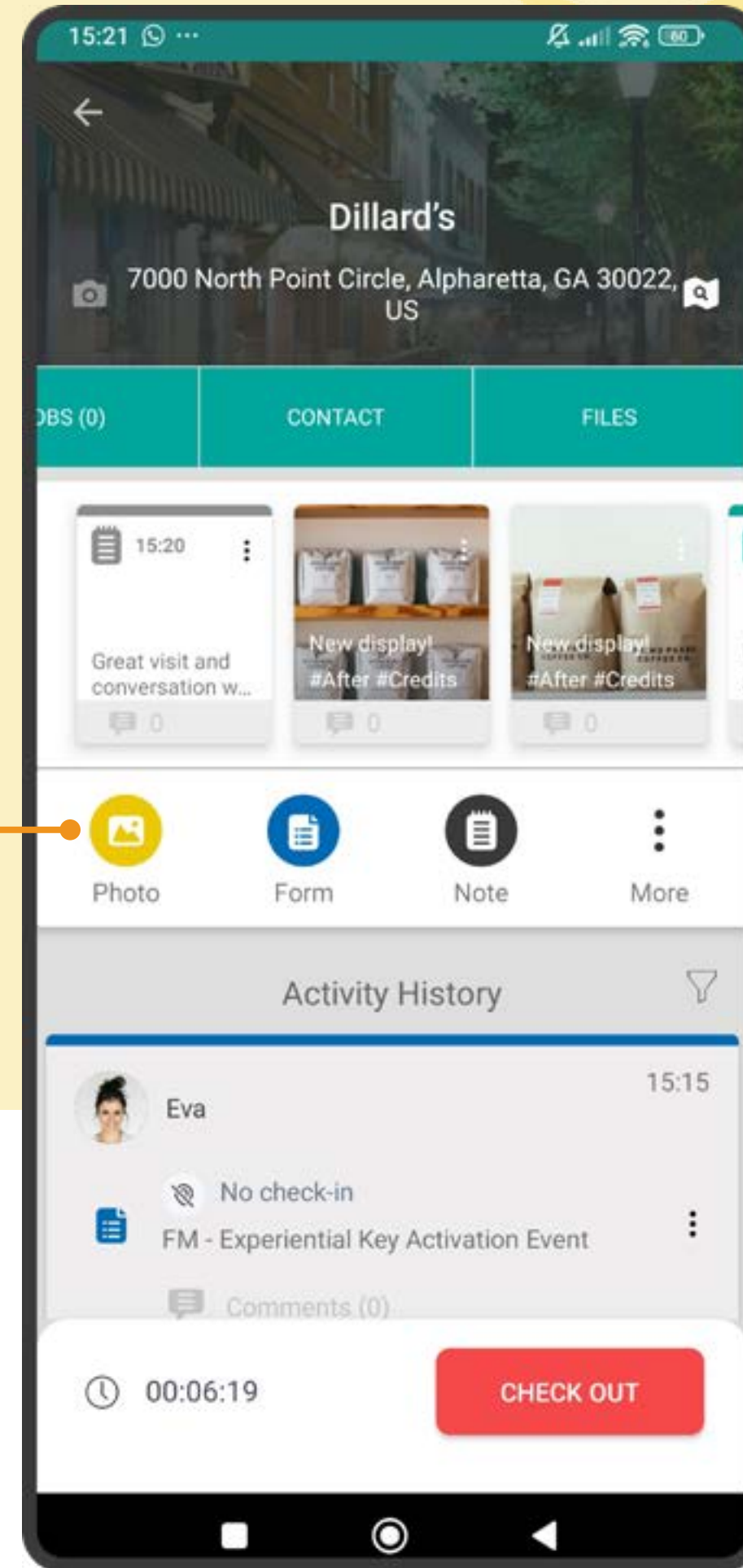
19

HOW TO TAKE A PHOTO

Capture photos, tag, and share them directly from the field for immediate visibility into your accounts.

1

Check into a place using the **CHECK IN** icon, then tap on the **PHOTO**.



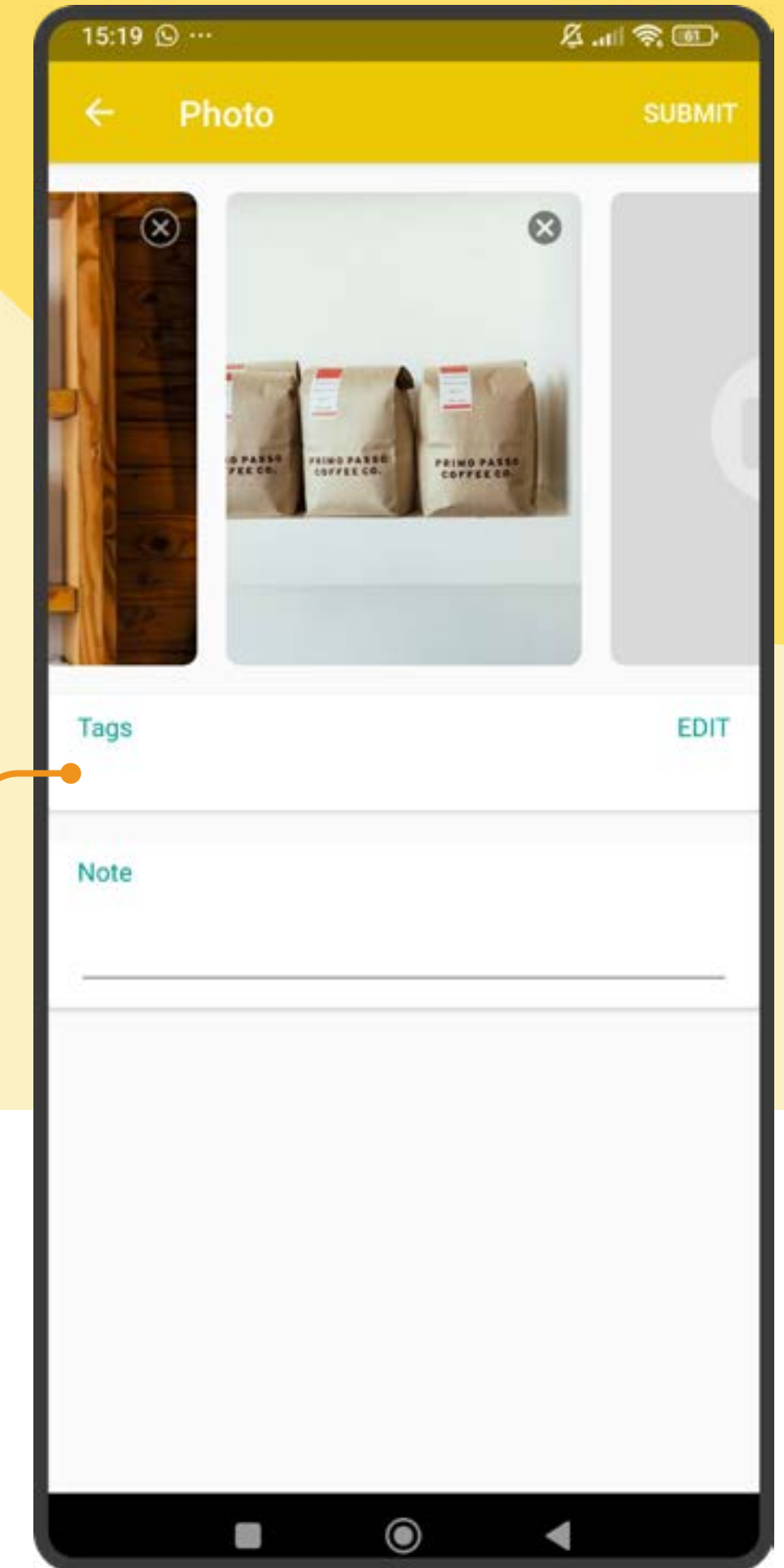
2

Take a photo with your device's camera or upload a photo from your gallery. Tap to submit a photo, or press and hold to select and upload multiple photos at once.



3

Add tags for easier photo organization or include additional notes. When you're done, tap **SUBMIT** and then **YES** to submit the photos.

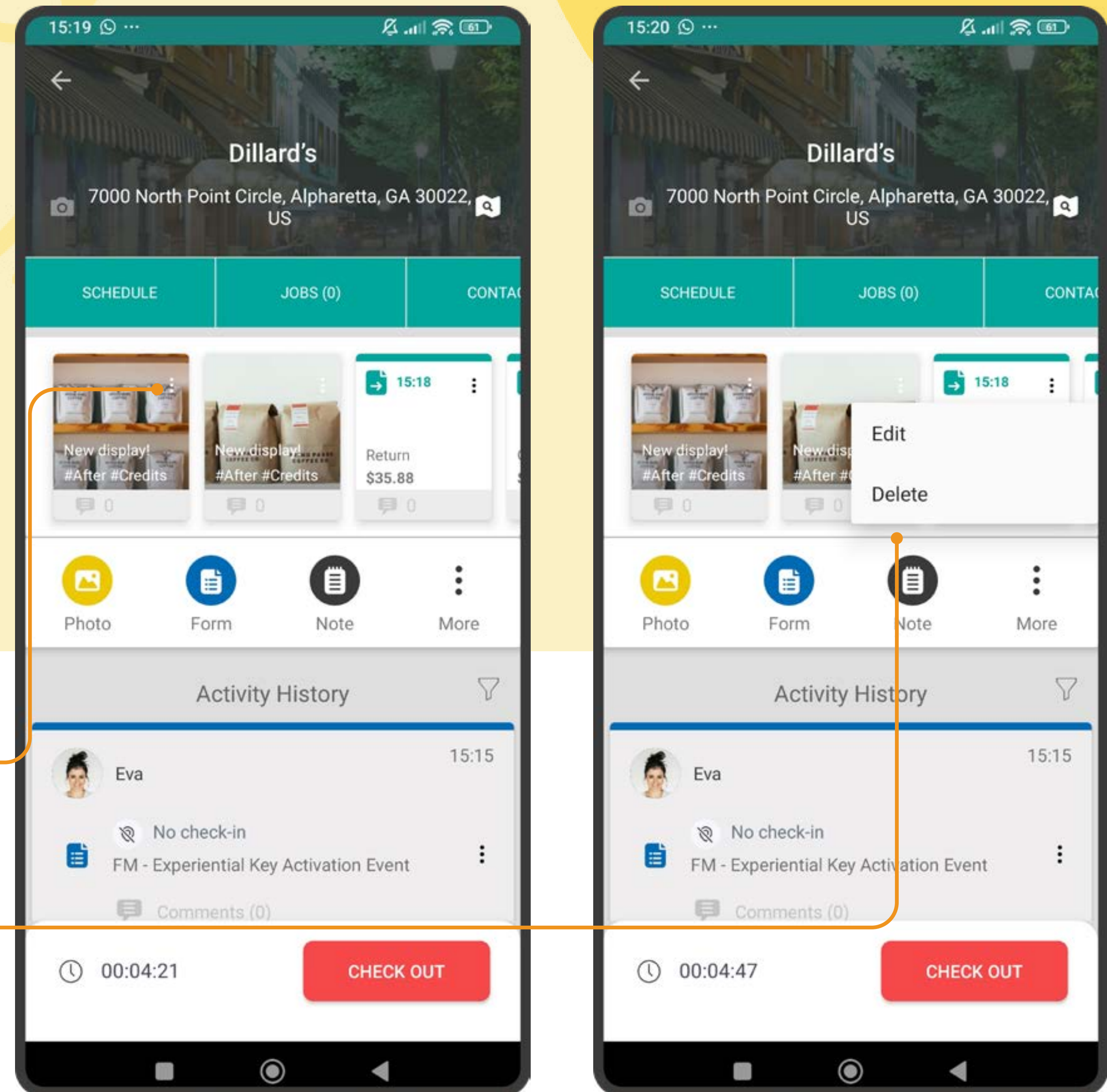


20

HOW TO DELETE A PHOTO

If you have accidentally submitted a photo, you can easily delete it.

- 1 Find the photo you want to delete and click on the **THREE DOTS**.
- 2 Click on **DELETE** to confirm your action and your photo will be deleted.



21

HOW TO ADD OR EDIT PHOTO TAGS

You can add notes or tags to photos while out in the field, or even after the photo is submitted to Repsly. Tagging helps your team filter through submitted photos and find what they need.

1

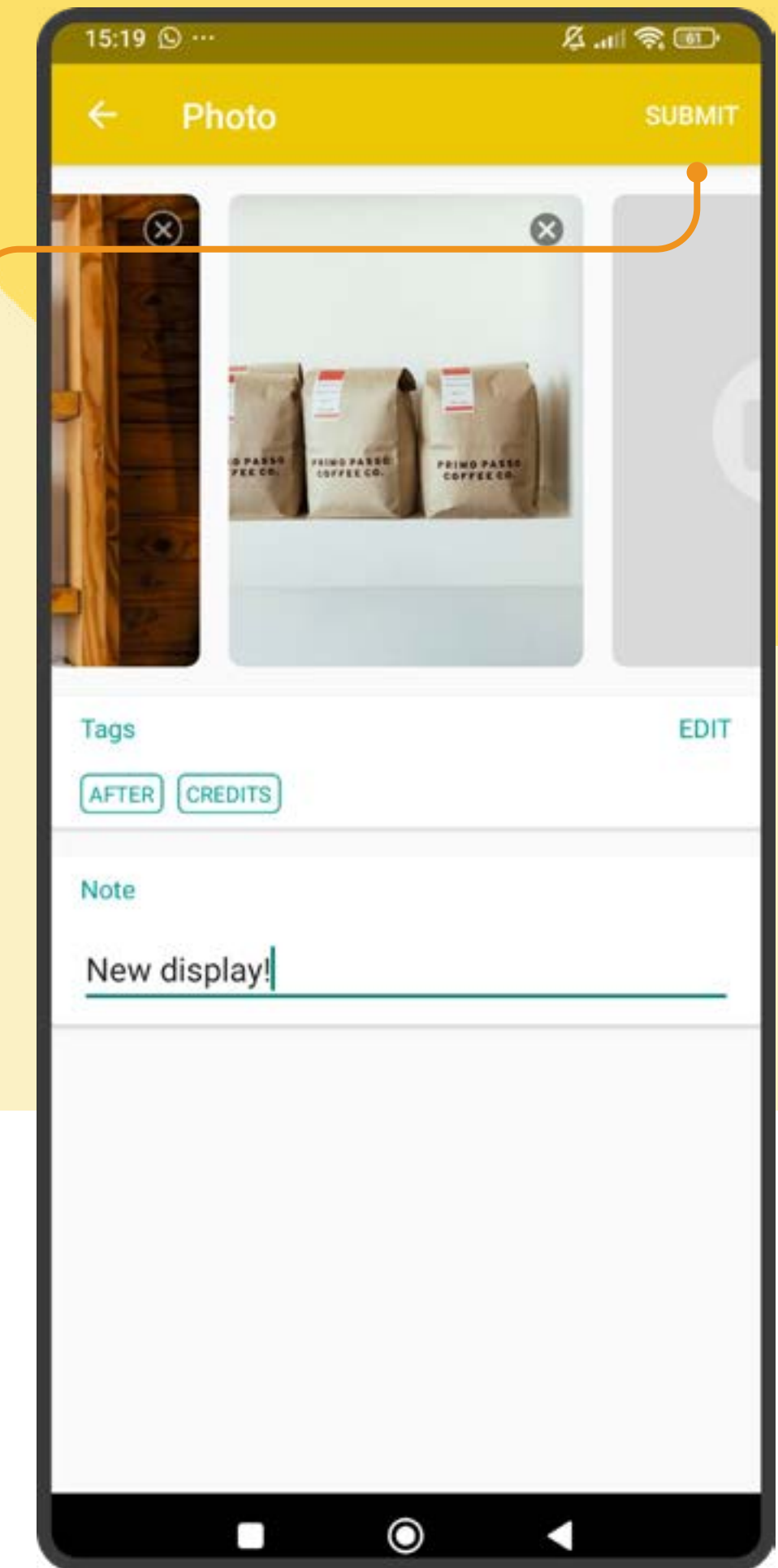
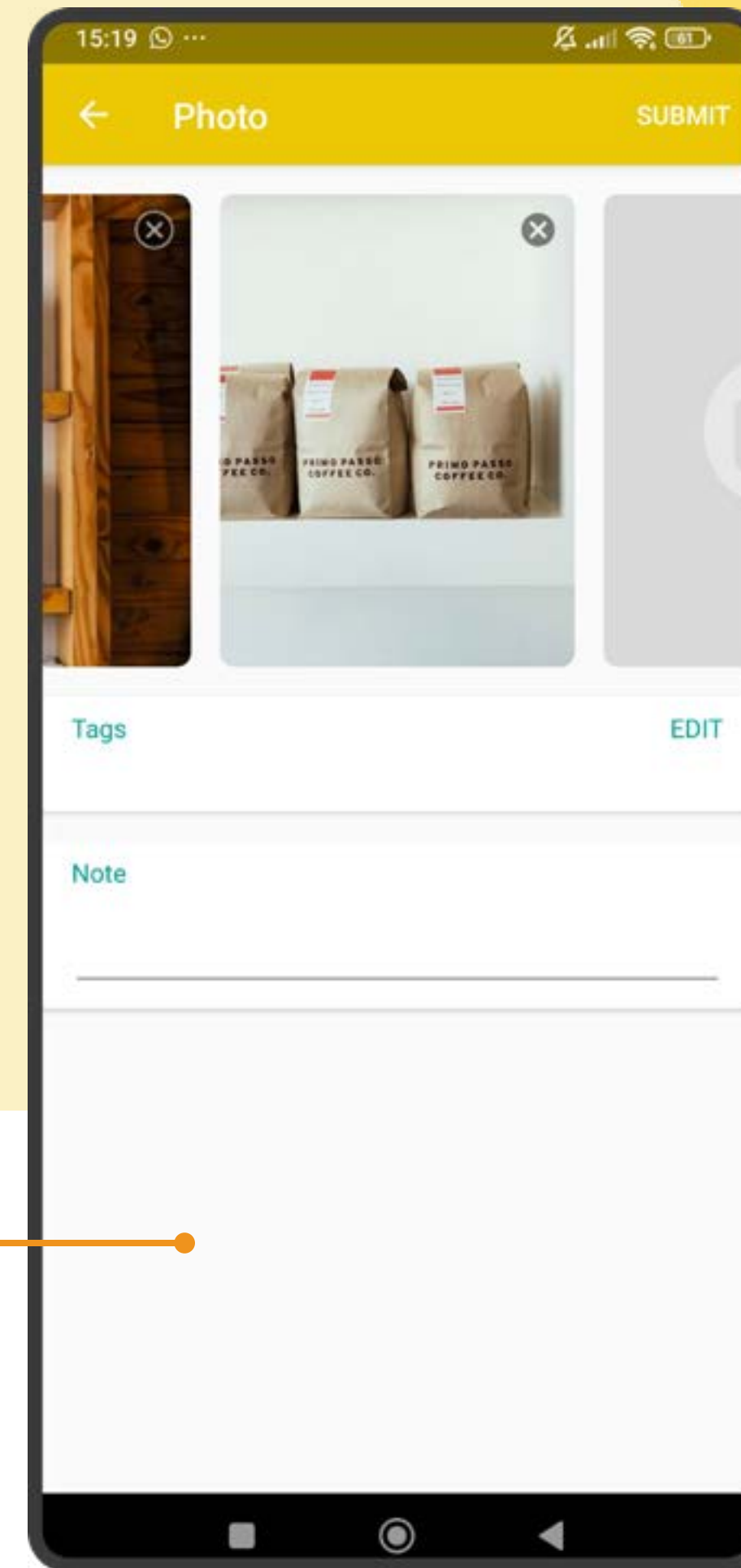
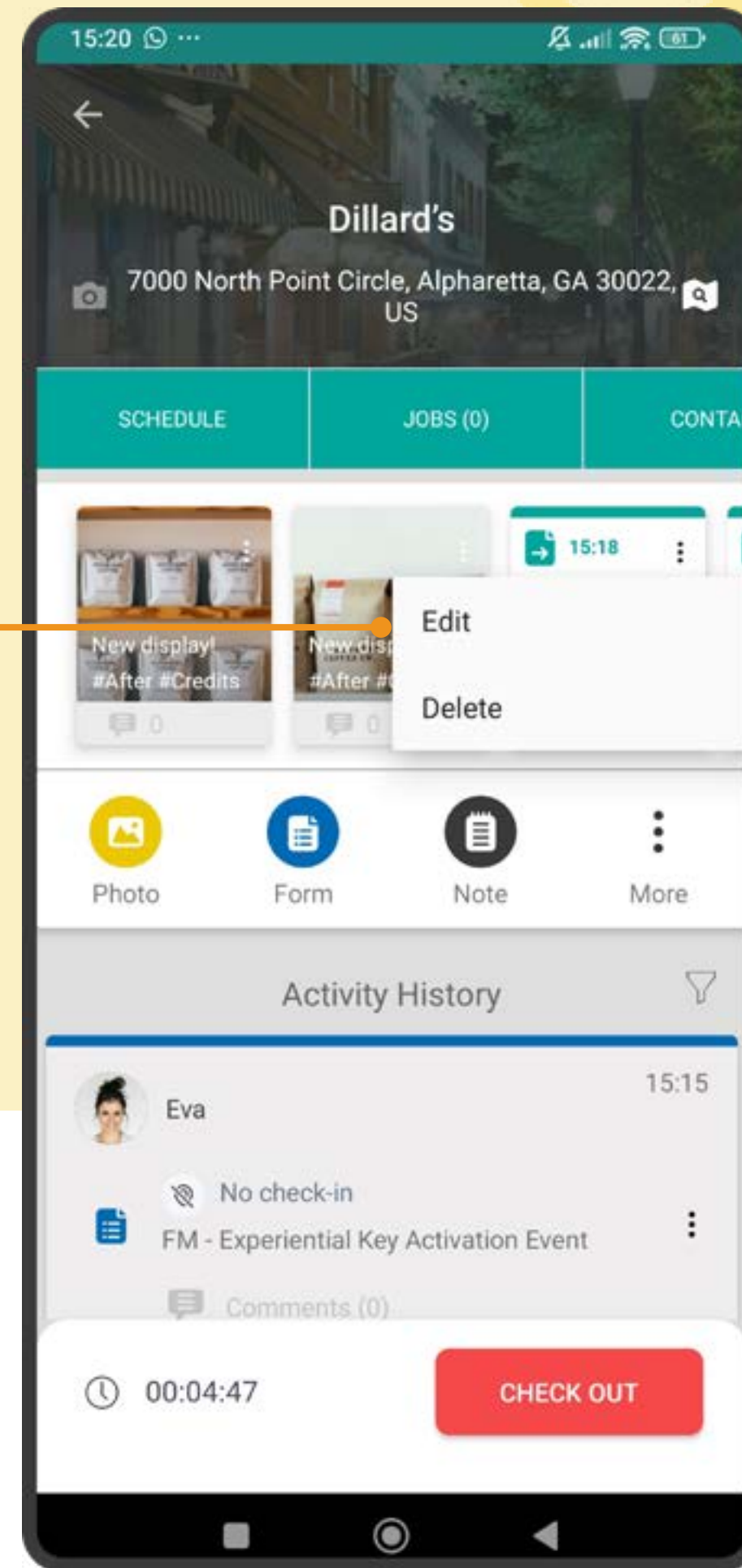
Find the photo you want to delete and click on the **THREE DOTS**. Select **EDIT**.

2

Tap on **EDIT TAGS AND NOTE** to confirm your action and start editing.

3

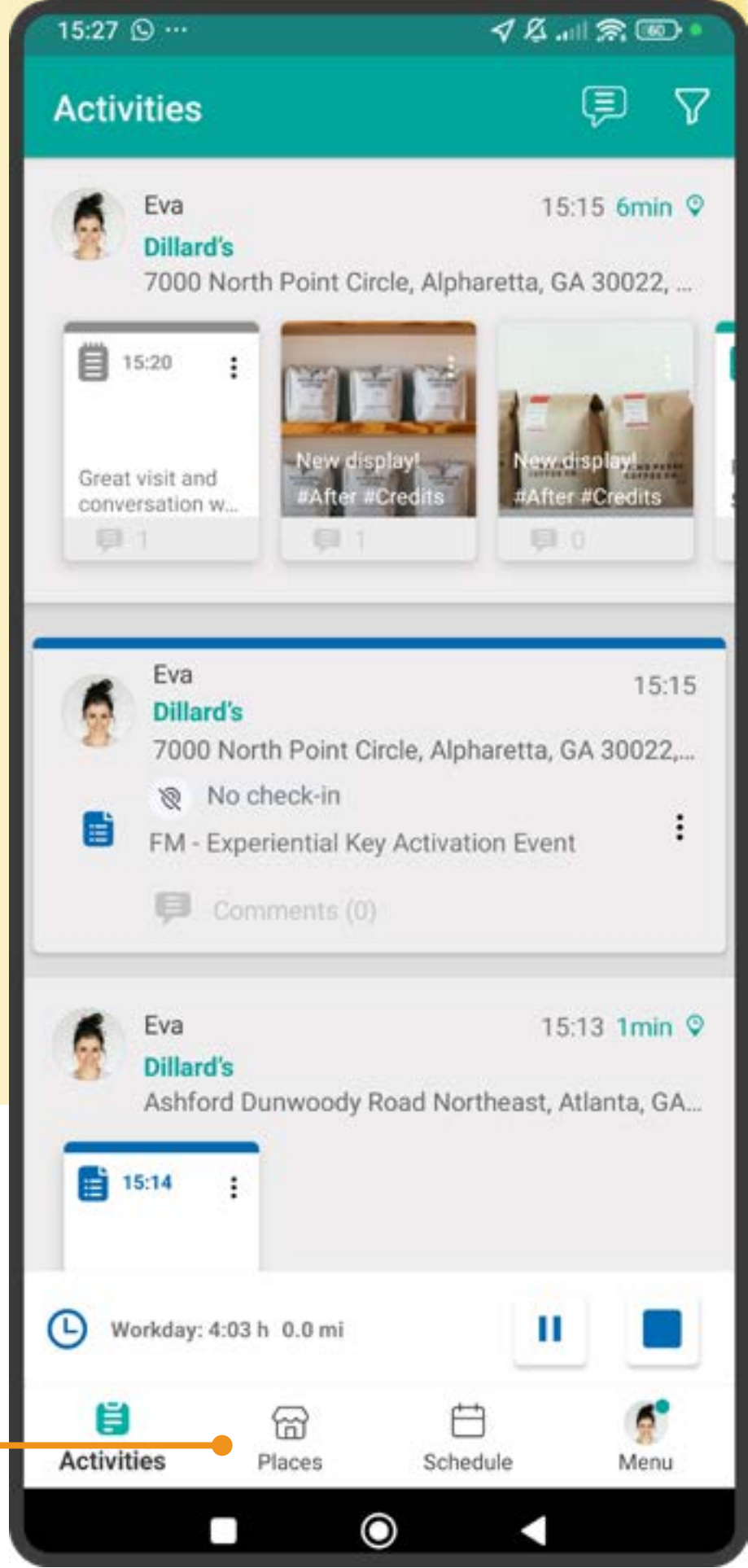
Once you're done with making changes, tap on the **SUBMIT**.

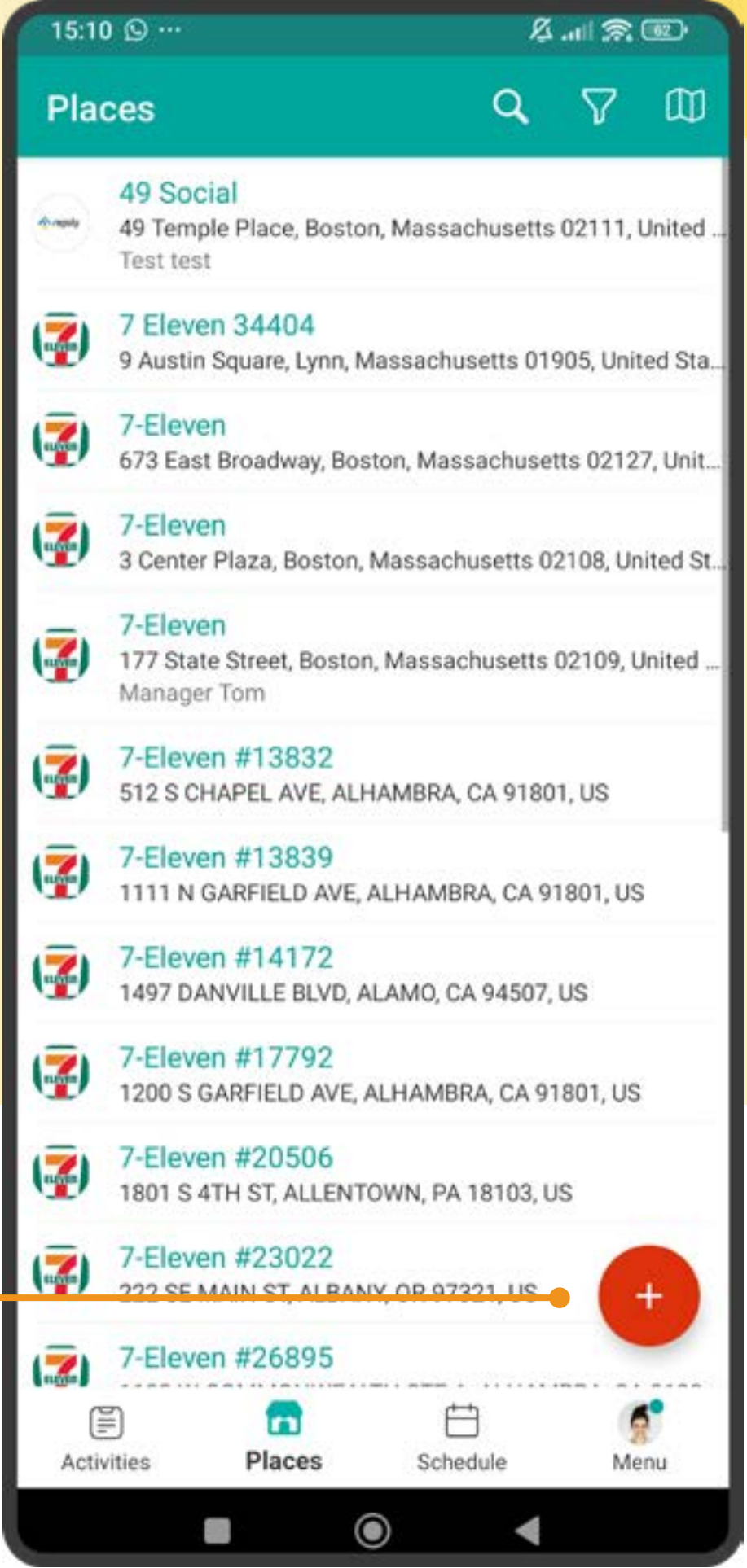


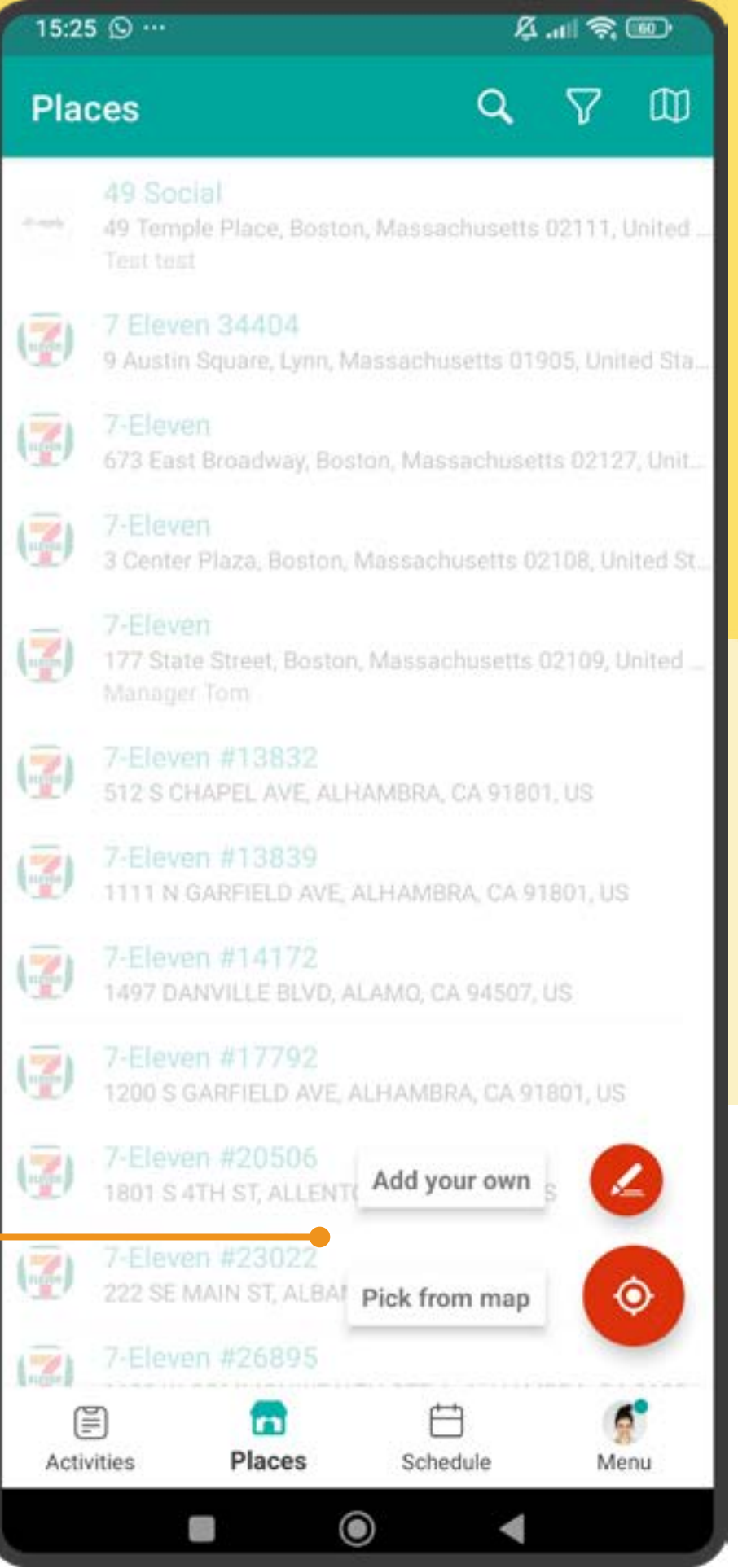
22

HOW TO ADD A PLACE

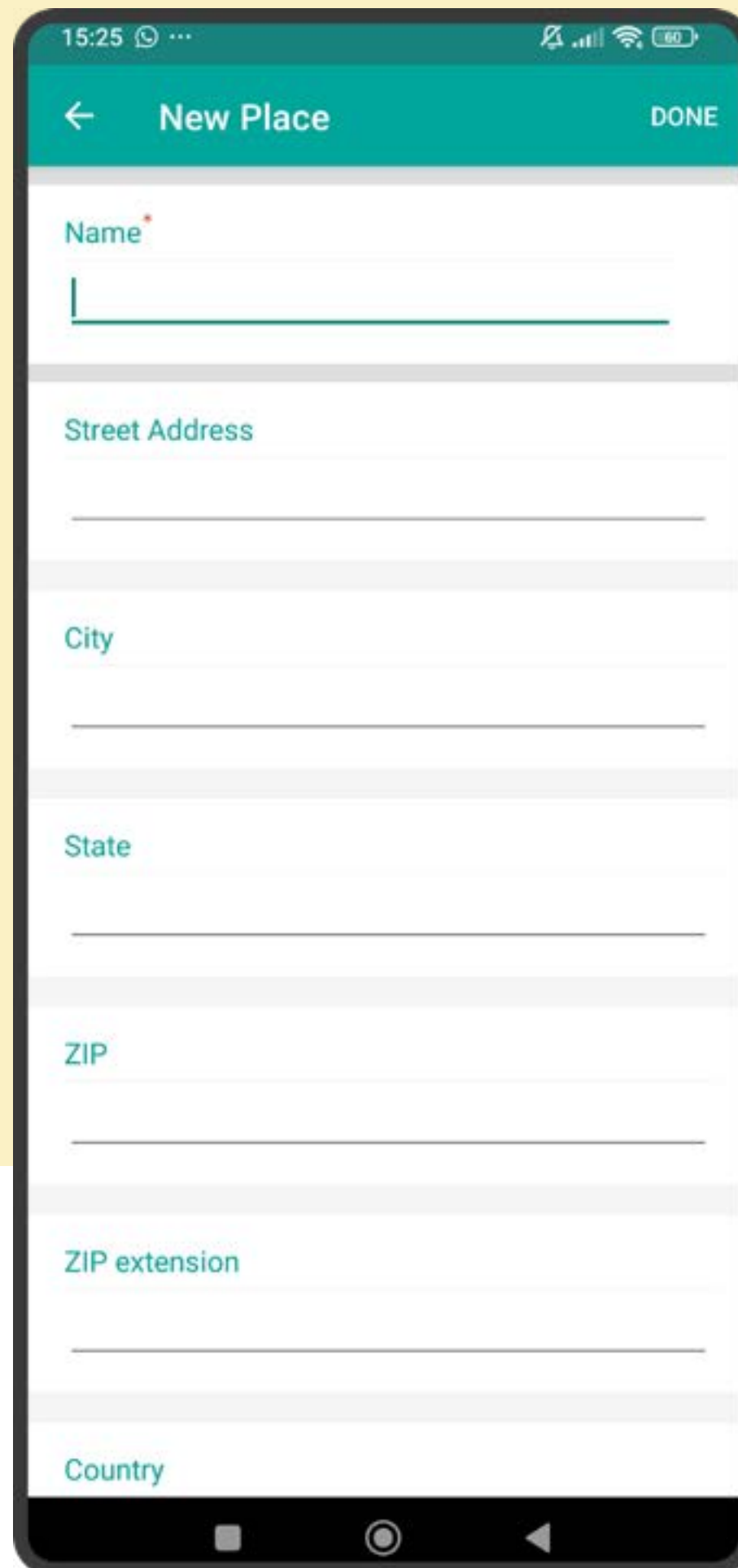
Depending on your account settings, you may be able to add new locations to your place list from the field.

- 

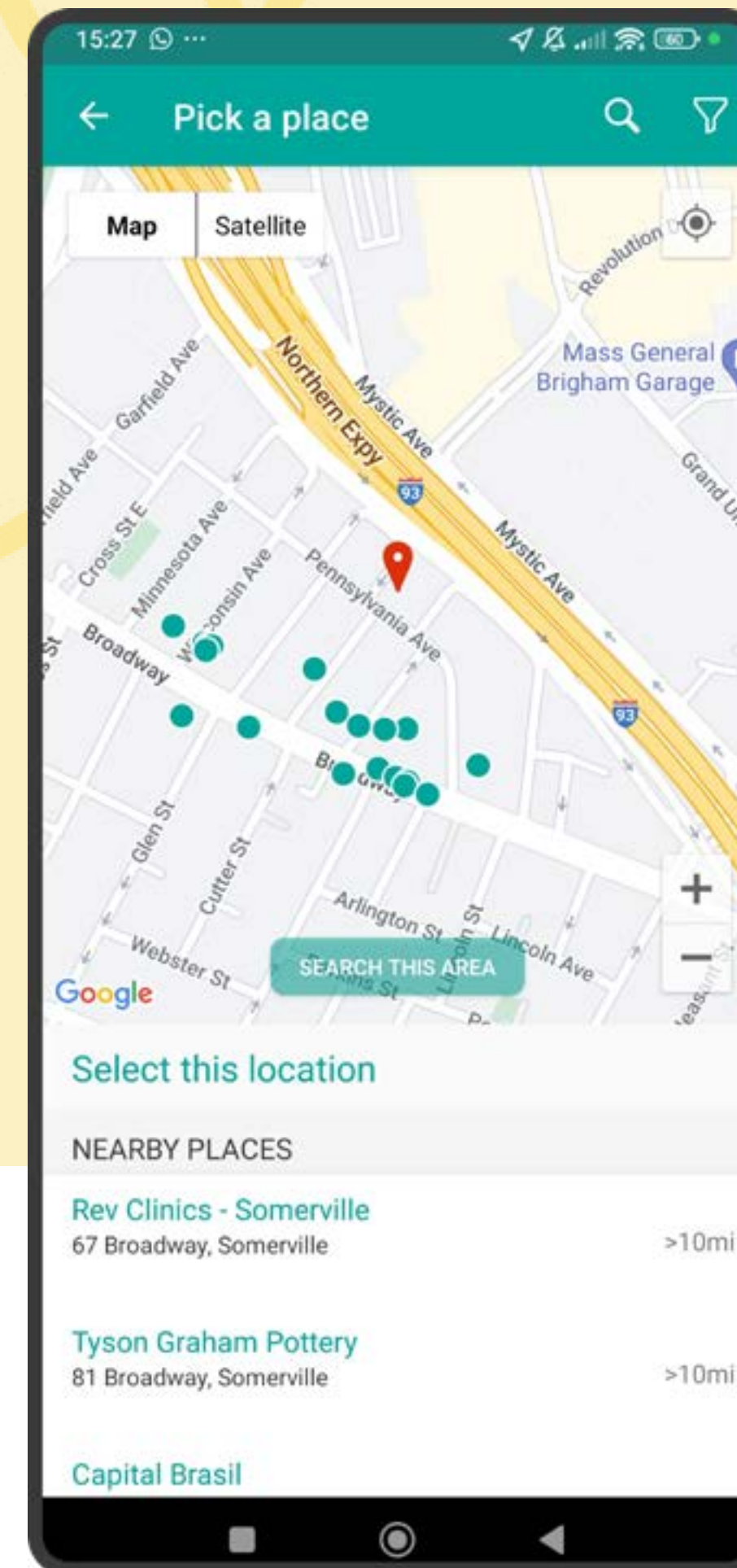
1 Click the **PLACES** tab.
- 

2 Tap on the **+ RED SIGN** at the bottom of the page.
- 

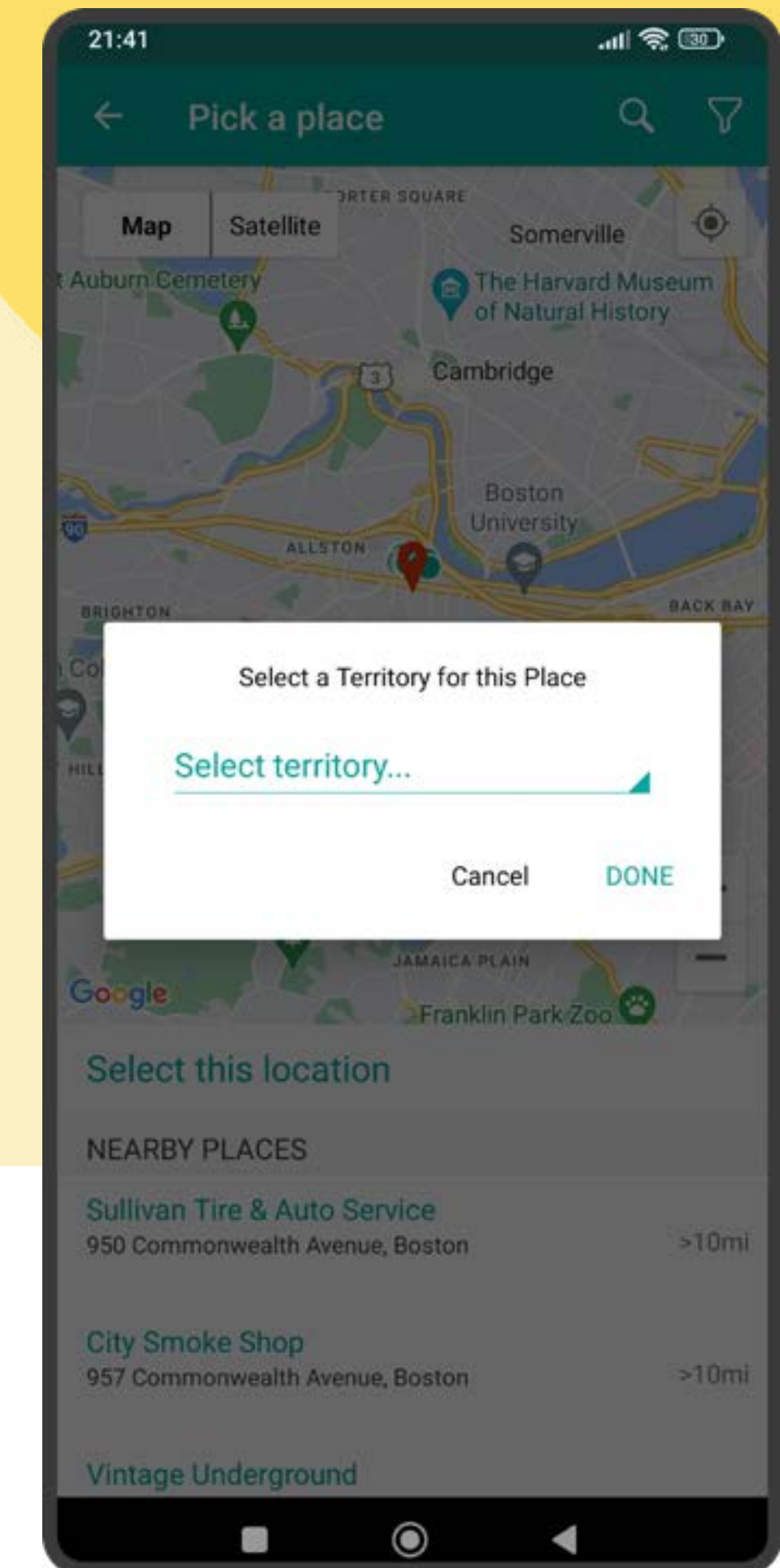
3 You can either choose from **Add your own** and **Pick from map**.



- 4 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.



- 5 If you have the option to **Pick from map**, your screen will display your location and the location of prospective leads in your area.



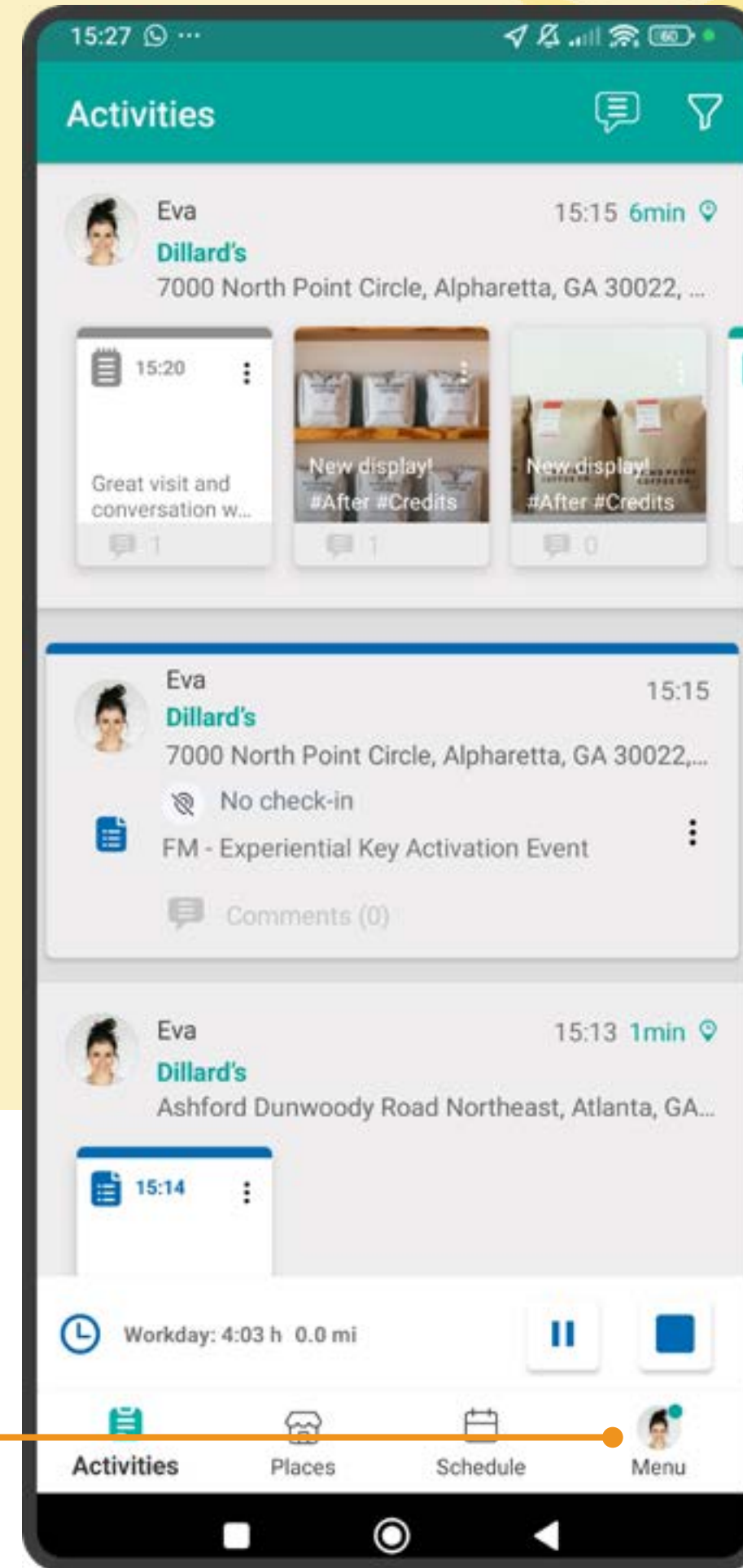
- 6 If you have multiple territories, select one for the new place. If you have only one territory, the new place will be assigned there automatically.

23

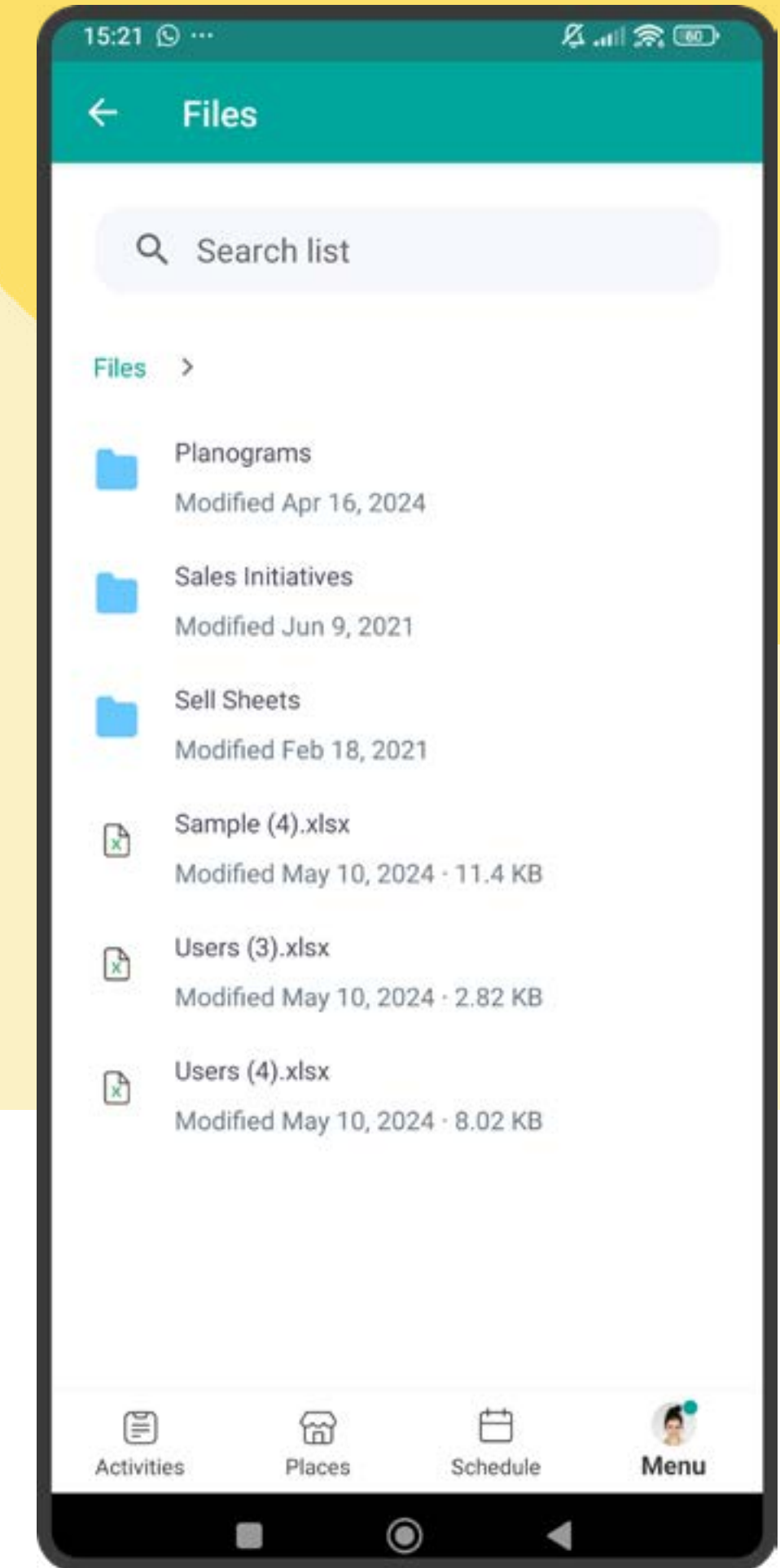
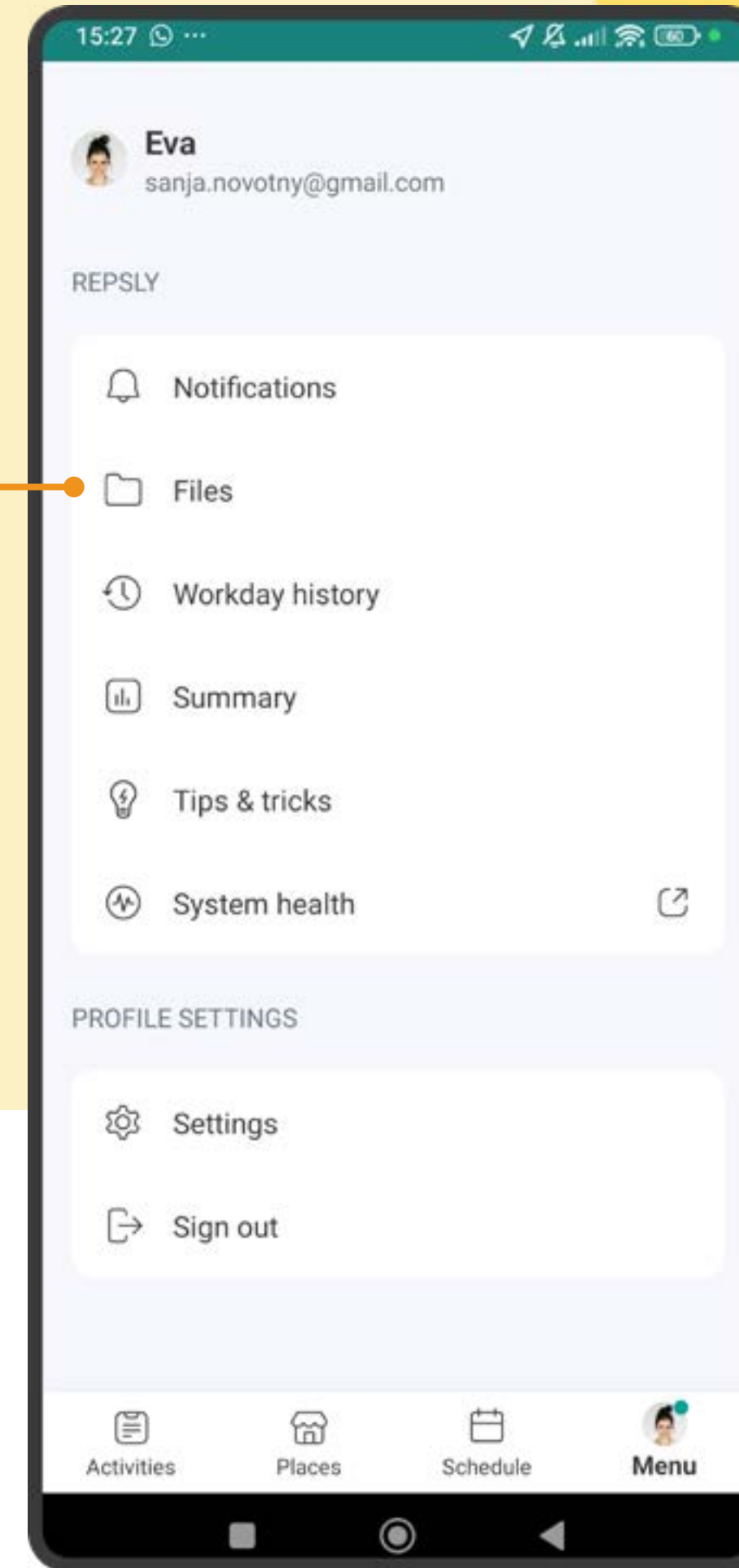
HOW TO ACCESS FILES ON THE GO

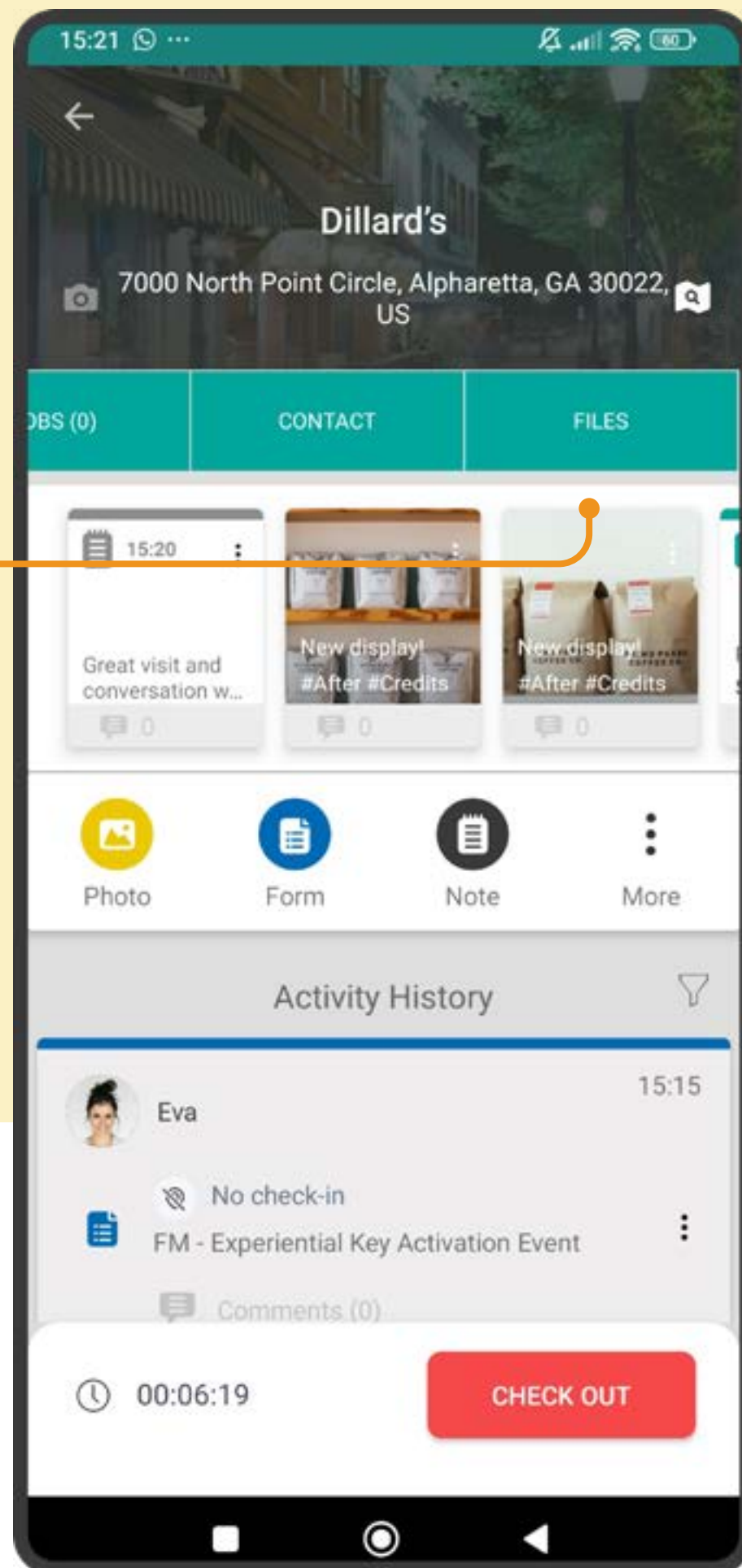
The Repsly app gives you access to all the files you need to win in your accounts. You can browse all files in the document library, or quickly find key files assigned to specific places.

1 Click on the **MENU** icon.

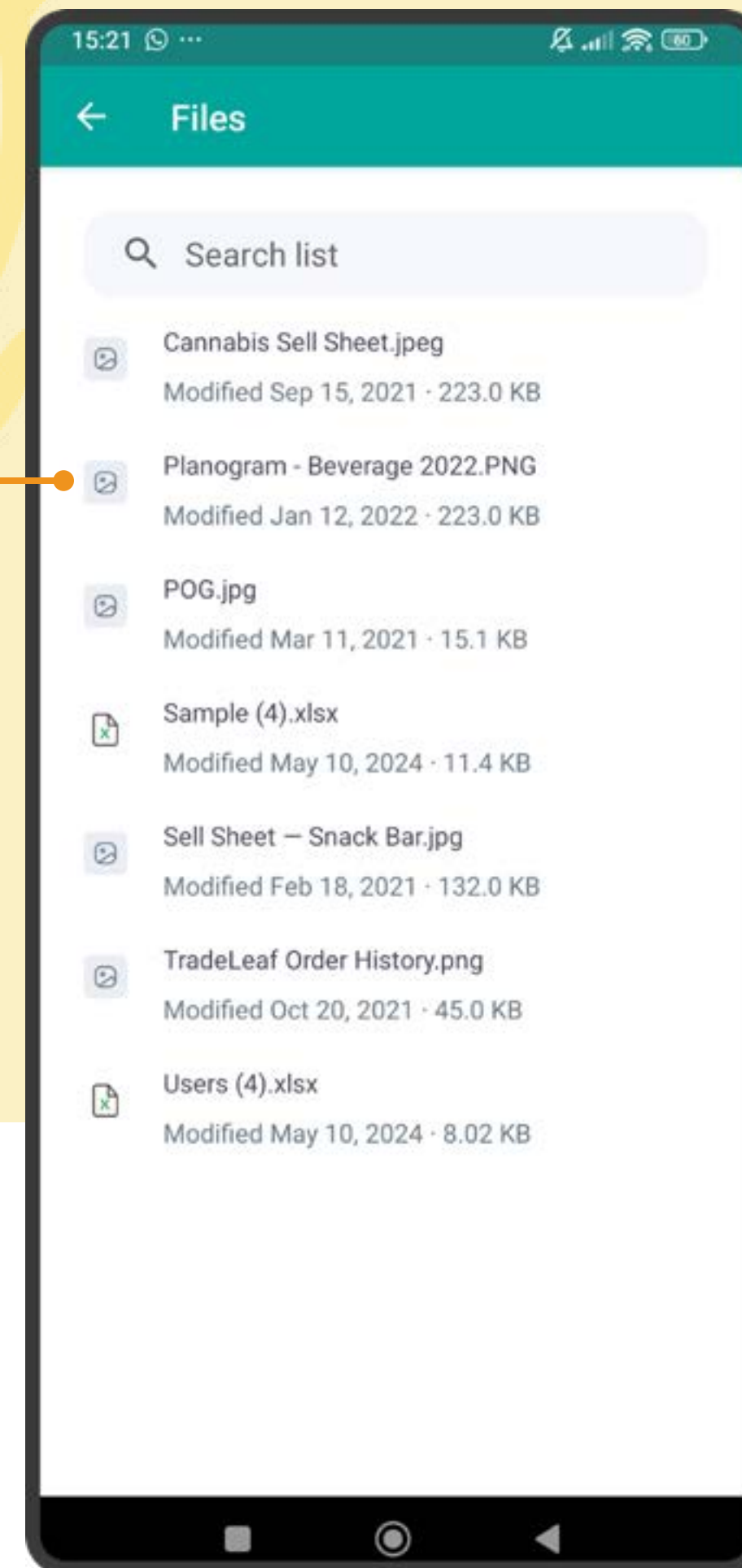


2 Select **FILES** and select the materials you need. Here, you can review all the files available to you.

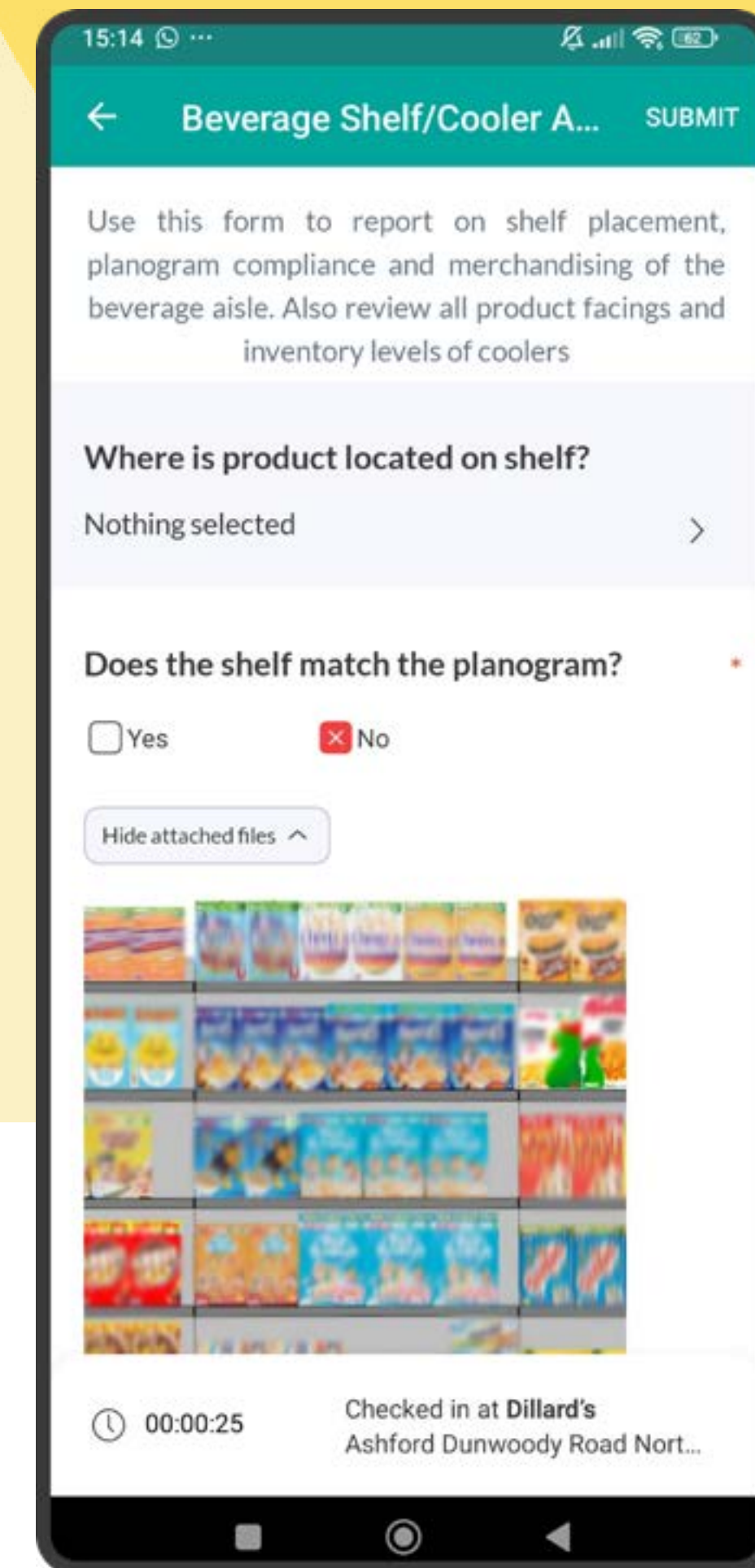




- 3** To find key files assigned to specific places you need to select a place. Tap on the **FILES**.



- 4** Select the attachment you need to complete your visit.

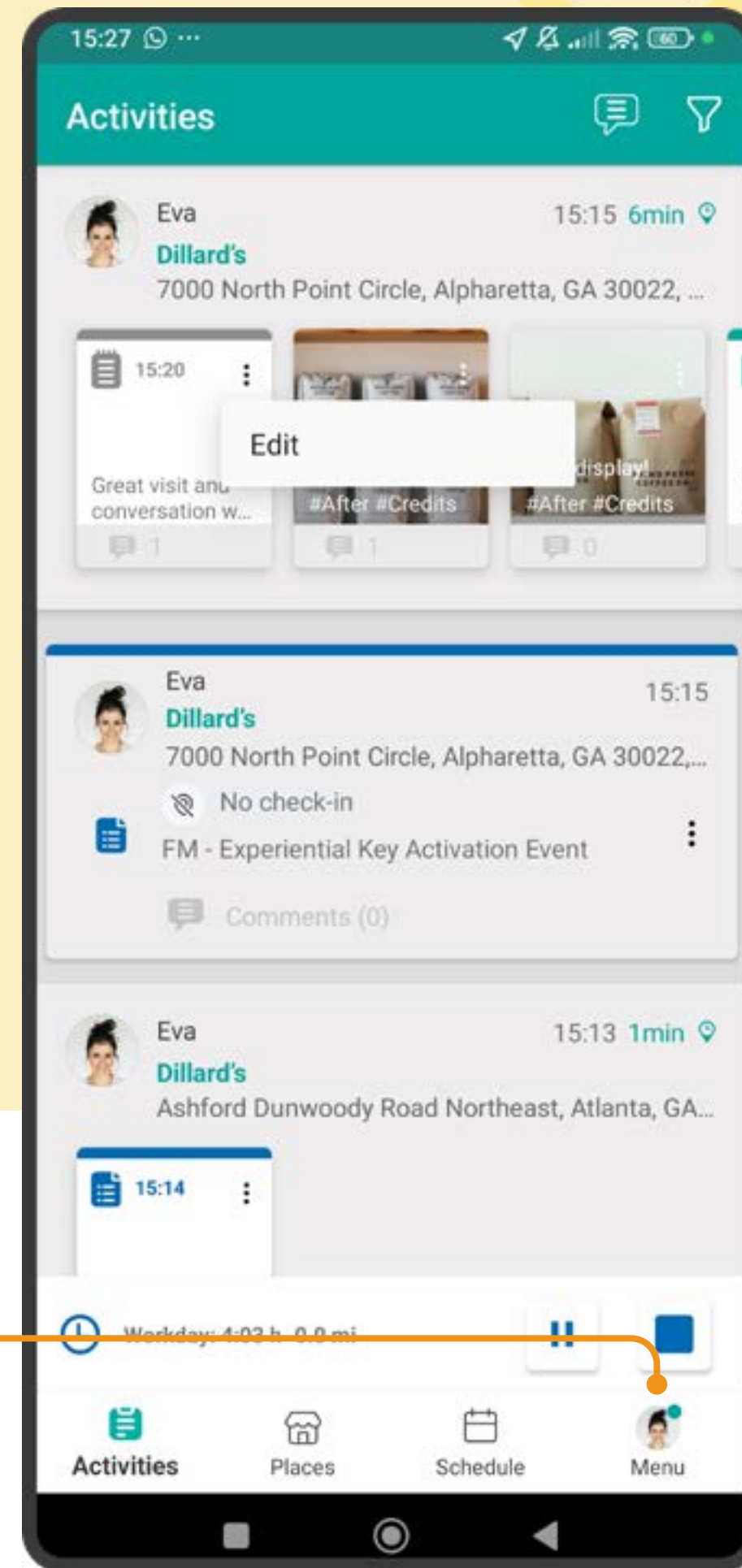


24

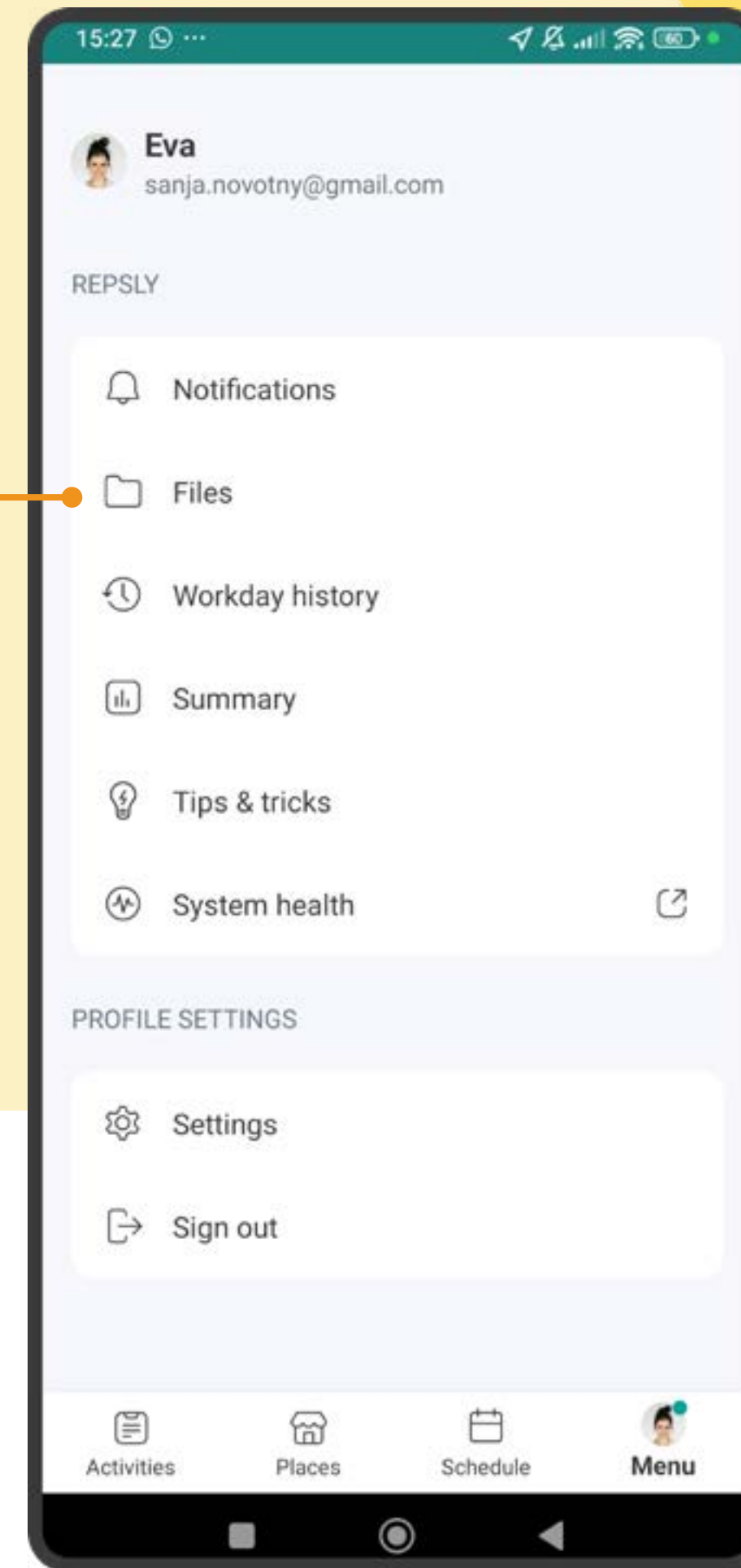
HOW TO VIEW YOUR NOTIFICATIONS

You will receive a notification any time one of your team members comments on one of your activities.

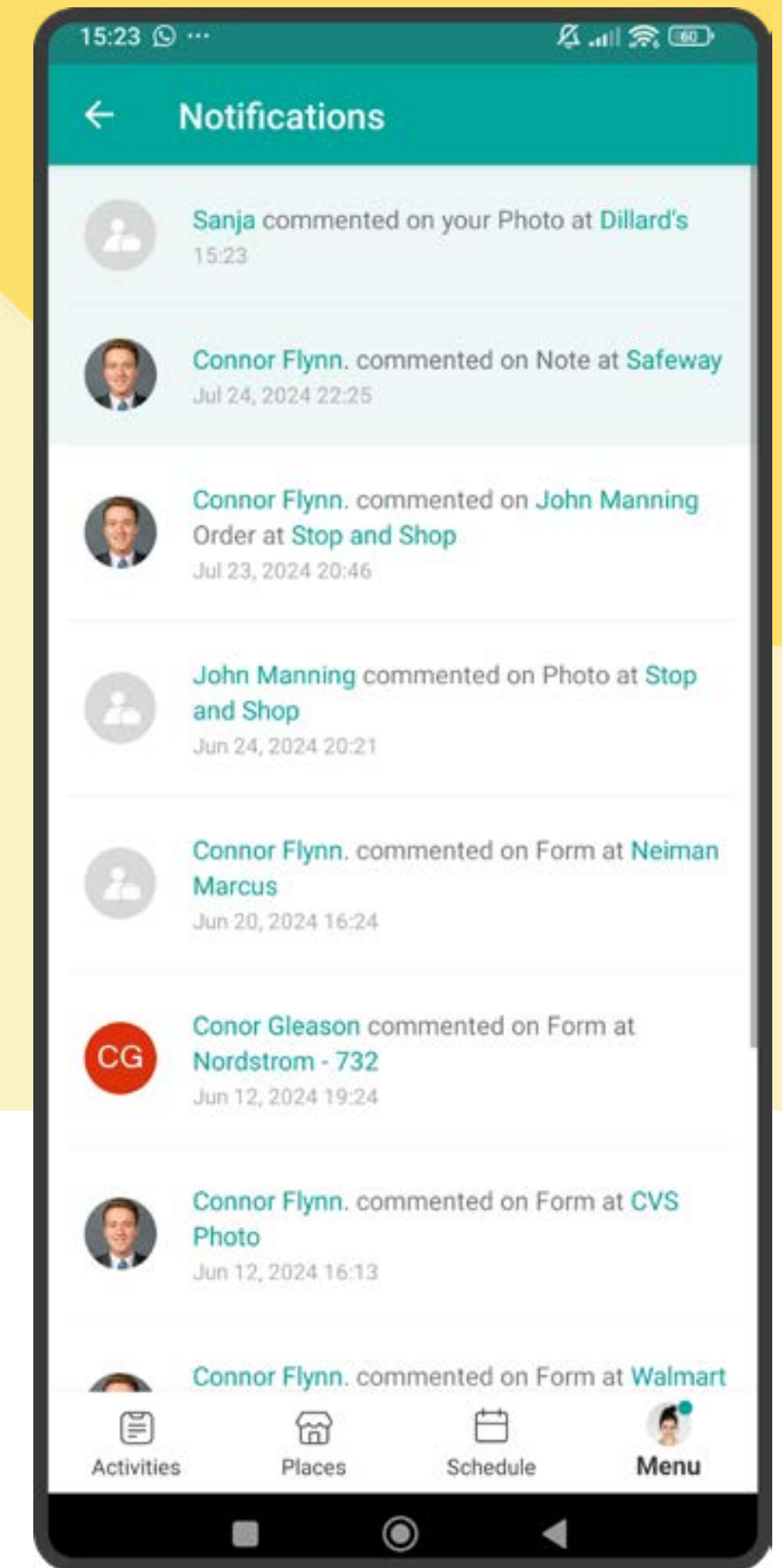
1 A green dot will appear on the **MENU** icon when you have a notification.



2 Tap **NOTIFICATIONS** to see all unread notifications.



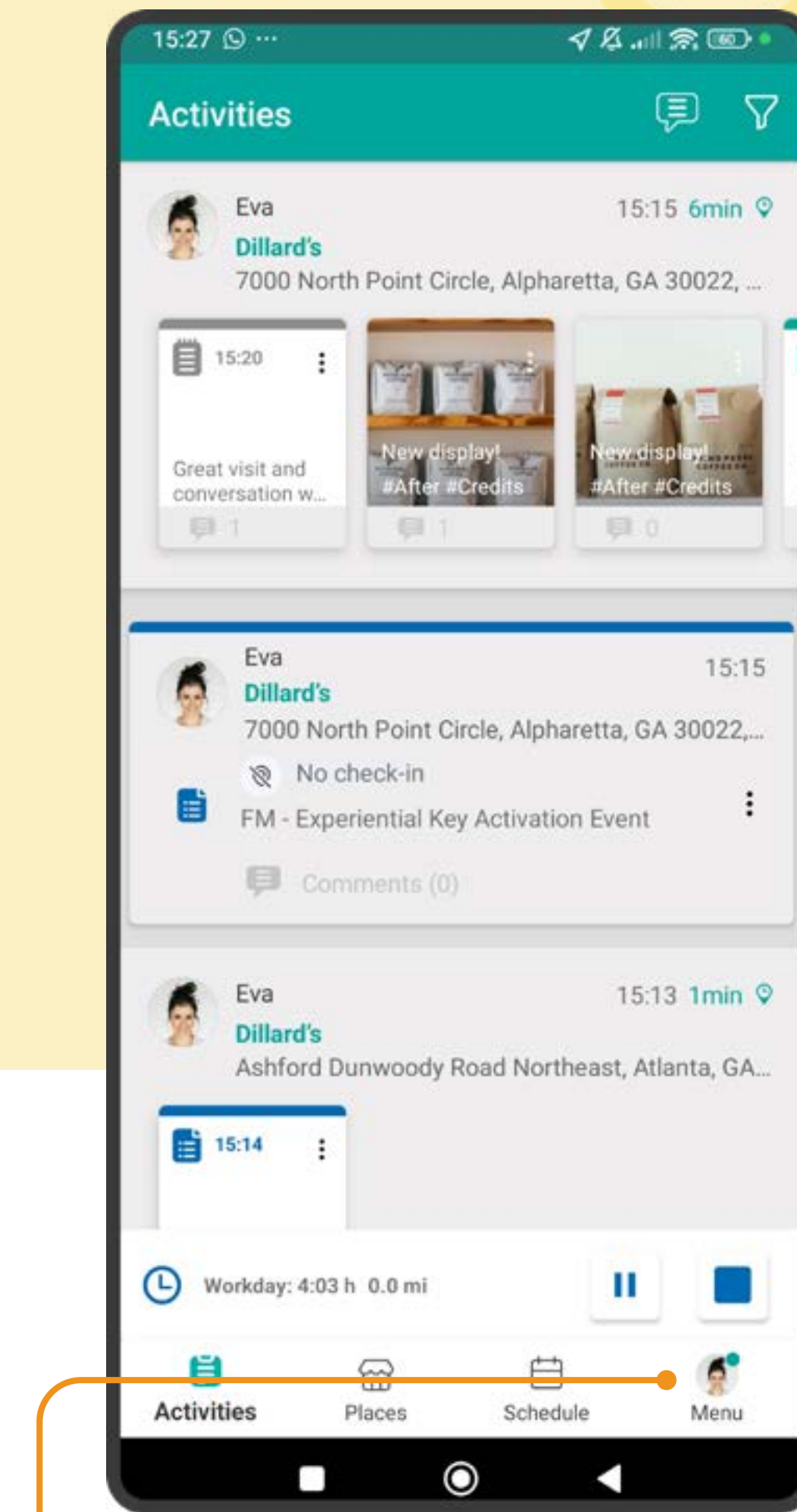
3 Notifications are listed with their details in chronological order.



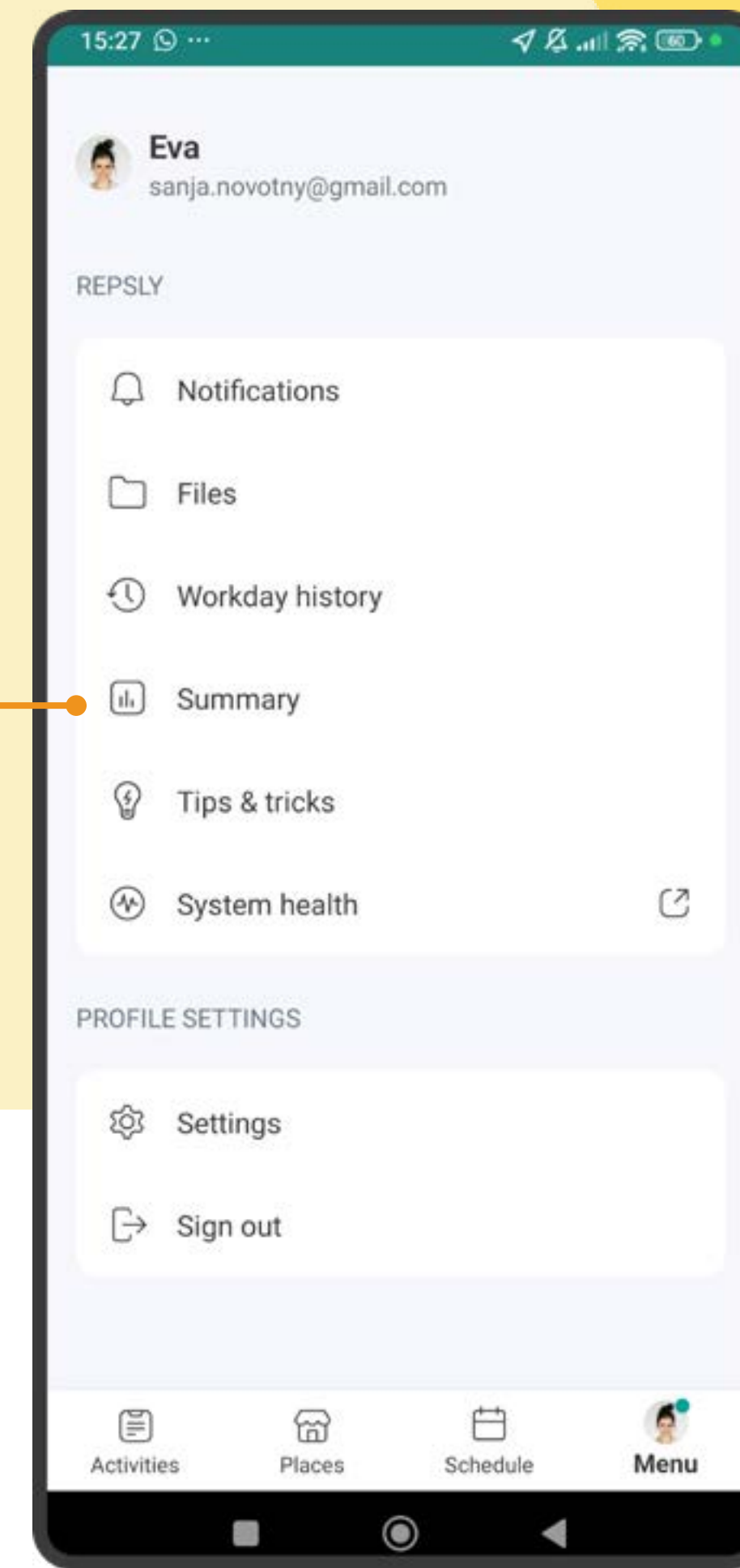
25

HOW TO VIEW A SUMMARY REPORT

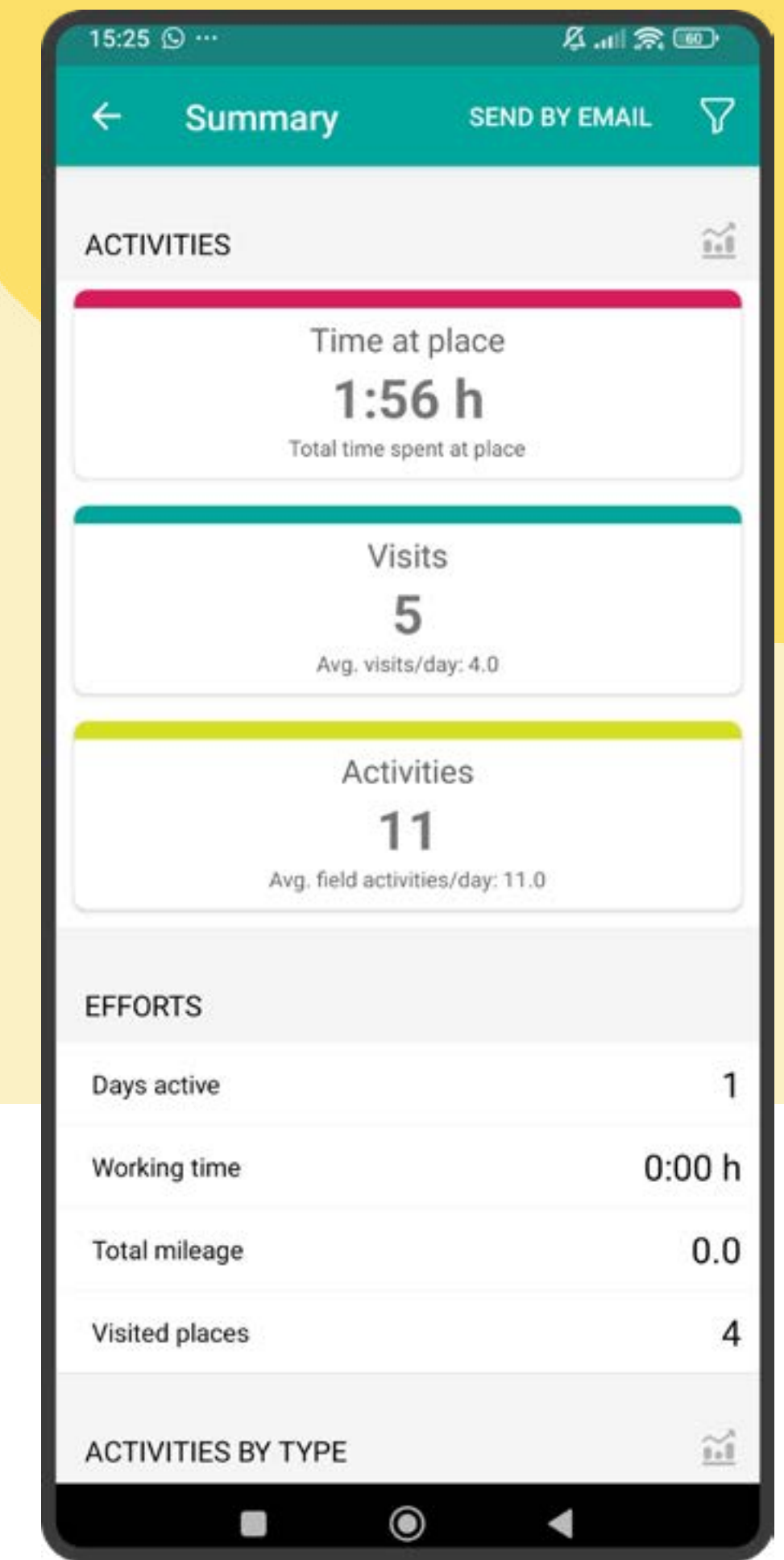
The summary report shows you an overview of your performance, so you can track your work, review your performance and improve your results.



1 Tap on the **MENU** icon.



2 Select **SUMMARY** and review your reports.

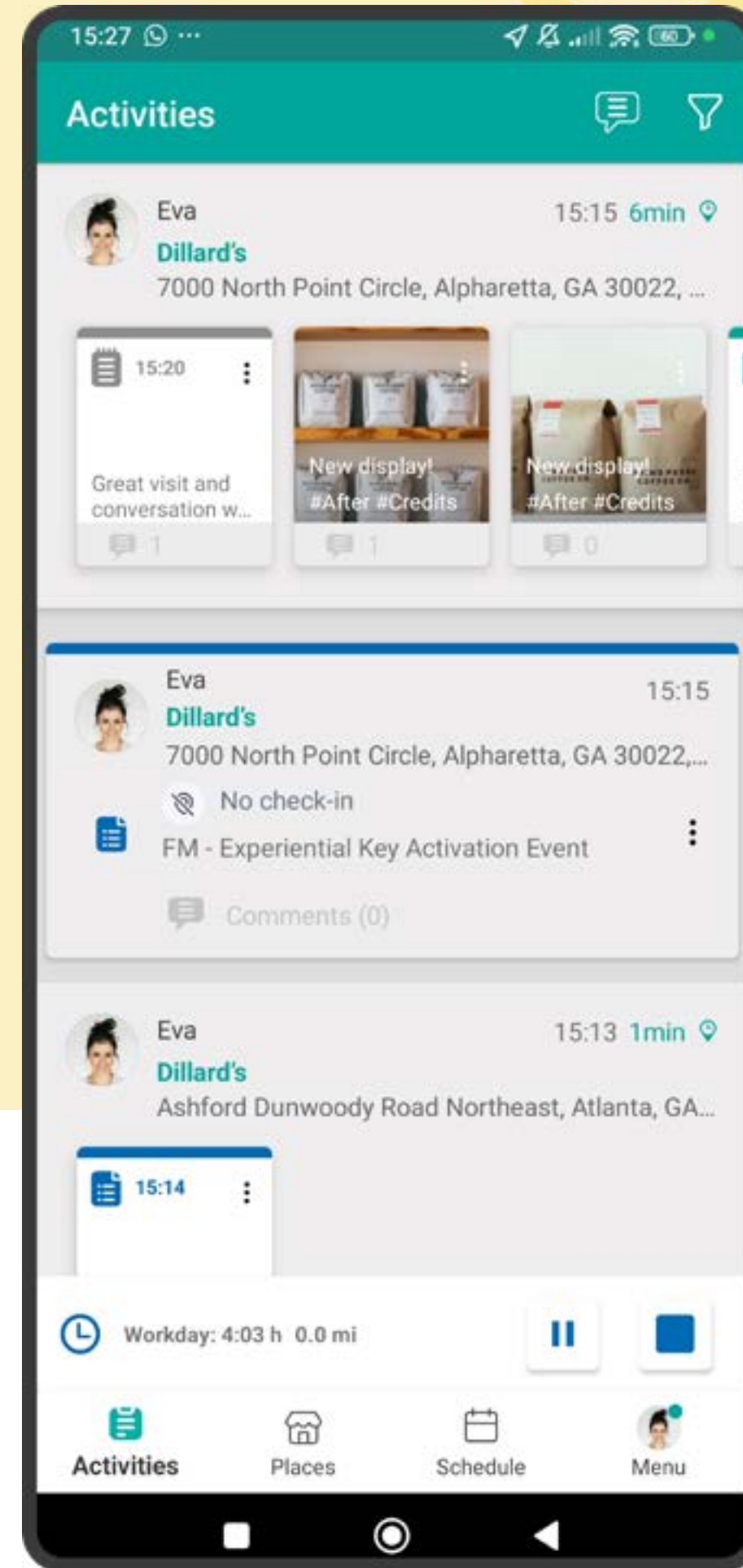


26

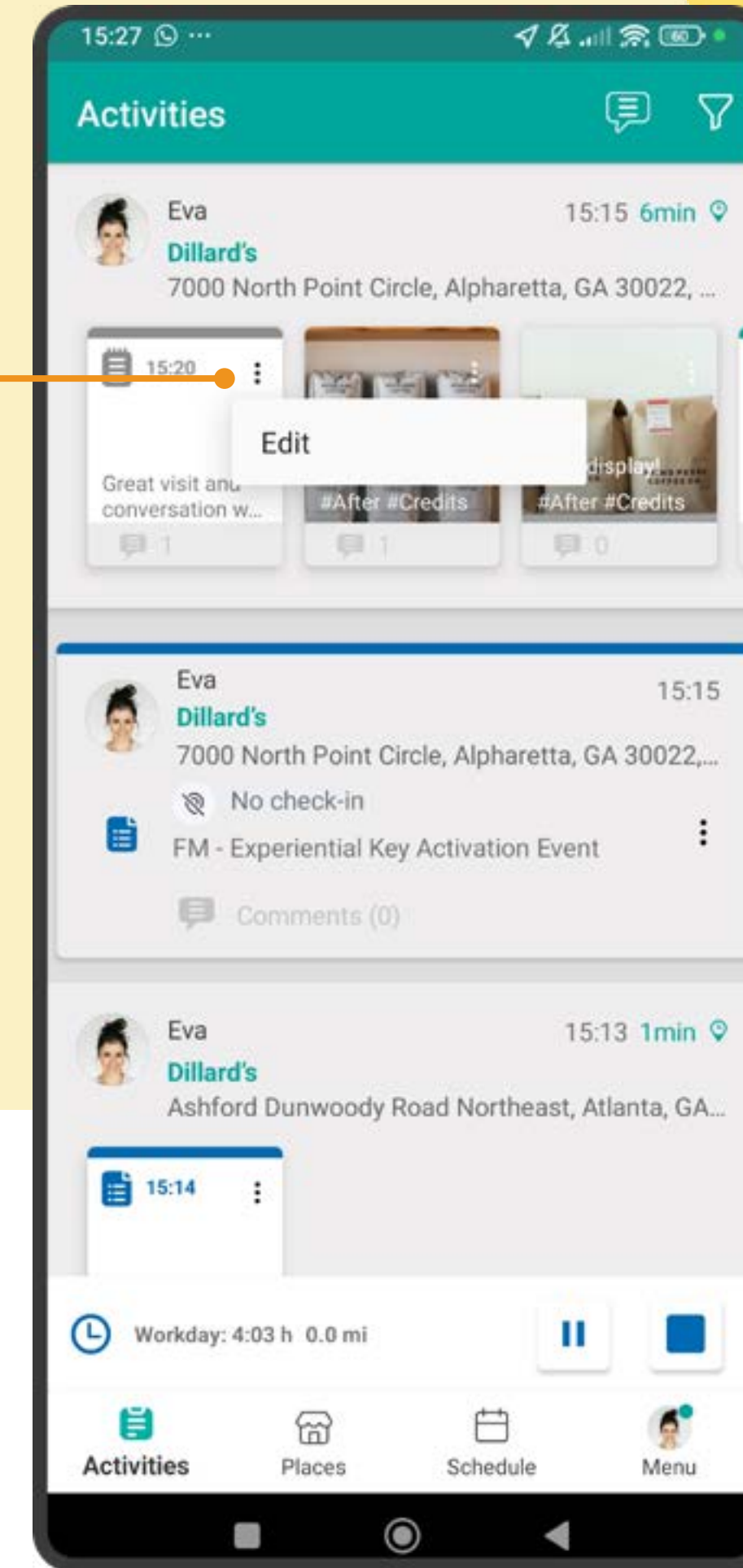
HOW TO EDIT SUBMITTED ACTIVITIES

Did you make a mistake or miss some information while filling out a form? No worries! We'll show you how to edit a submitted activity. The process is the same for all editable activities, including forms, notes, and photo notes...

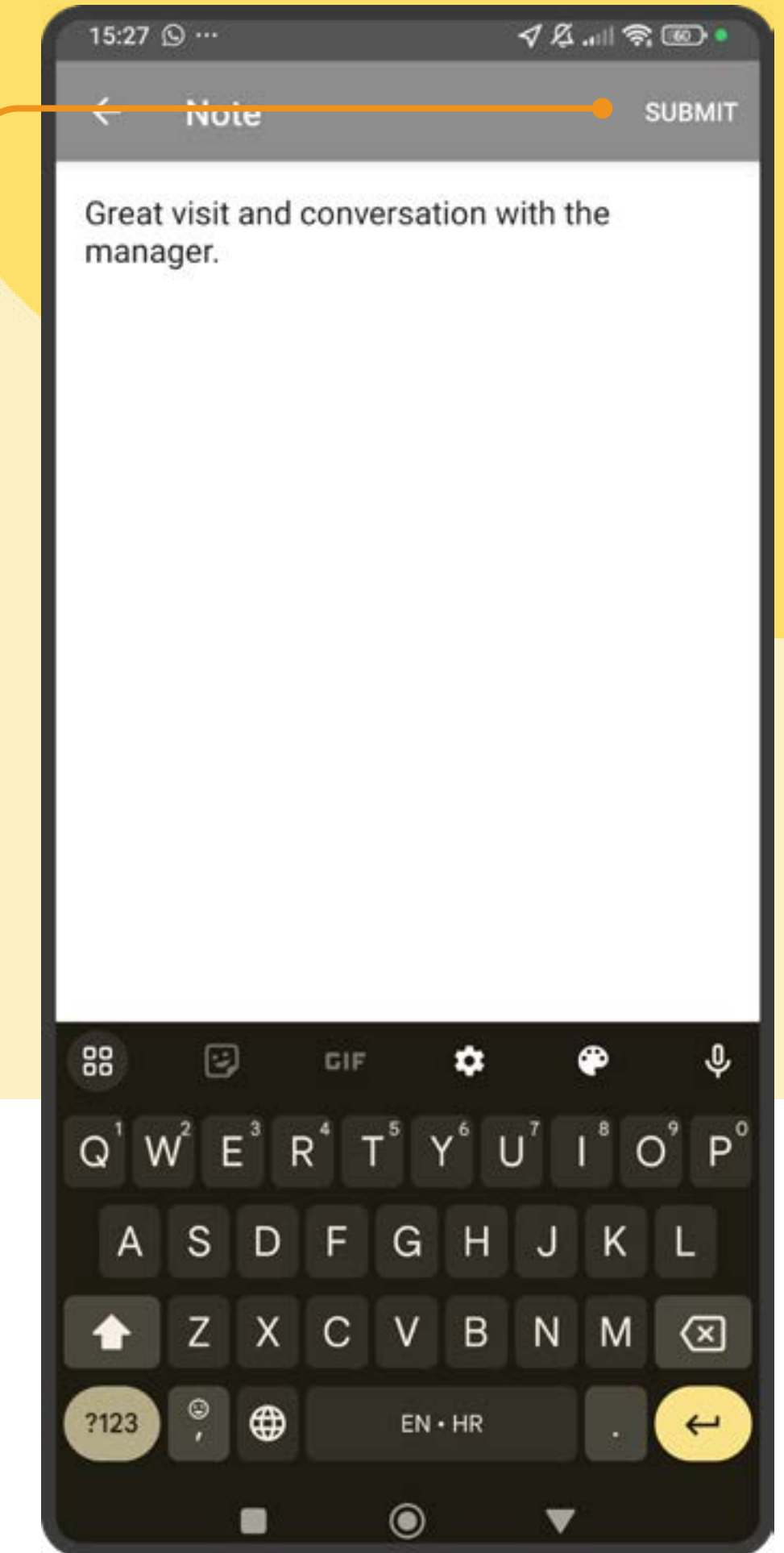
NOTE: You can make edits if your admin has granted you the necessary permissions in the app.



1 Find the activity you would like to edit. Click on it.



2 Click on three dots on selected activitie and select **EDIT**.



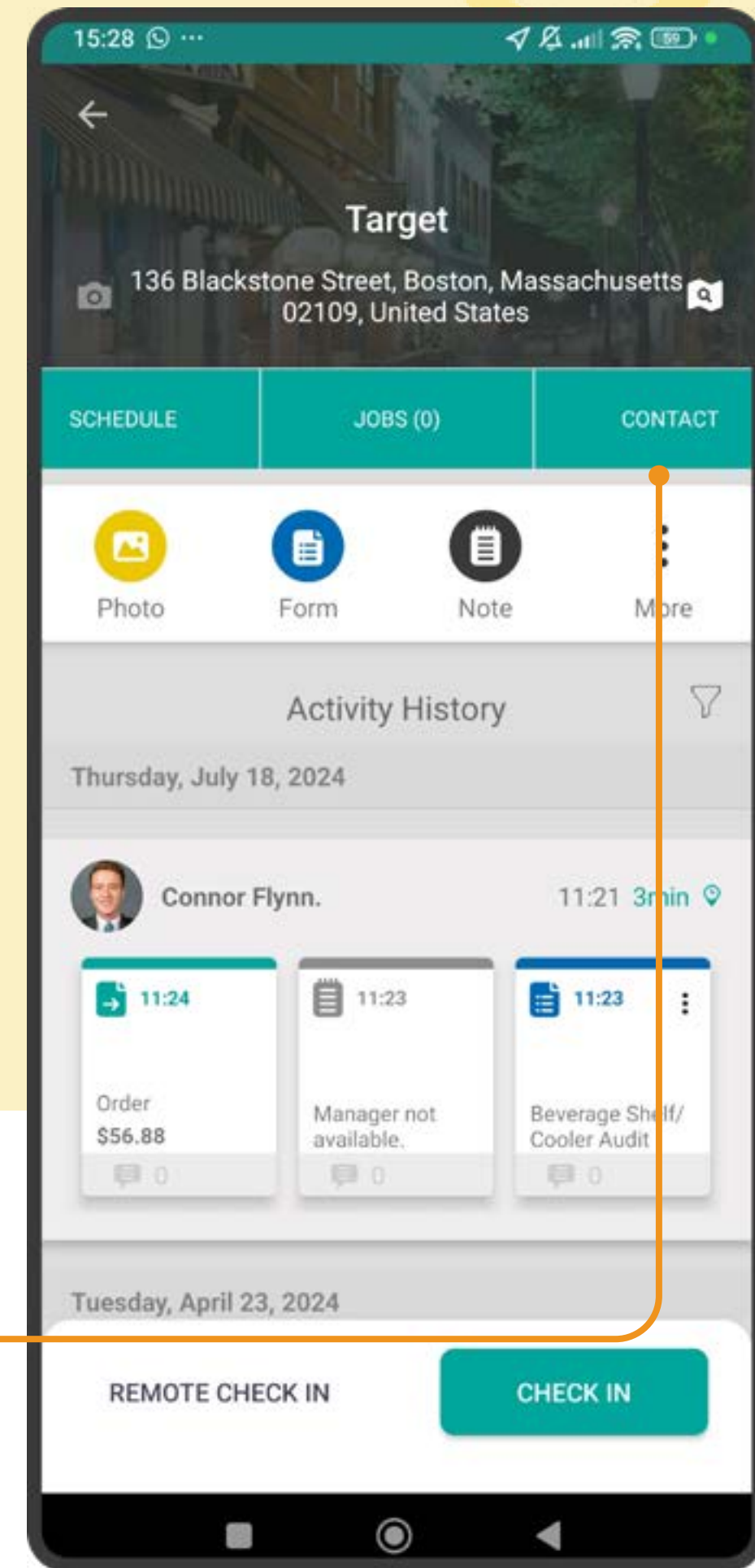
3 After you edit the certain answer click on **SUBMIT** button.

27

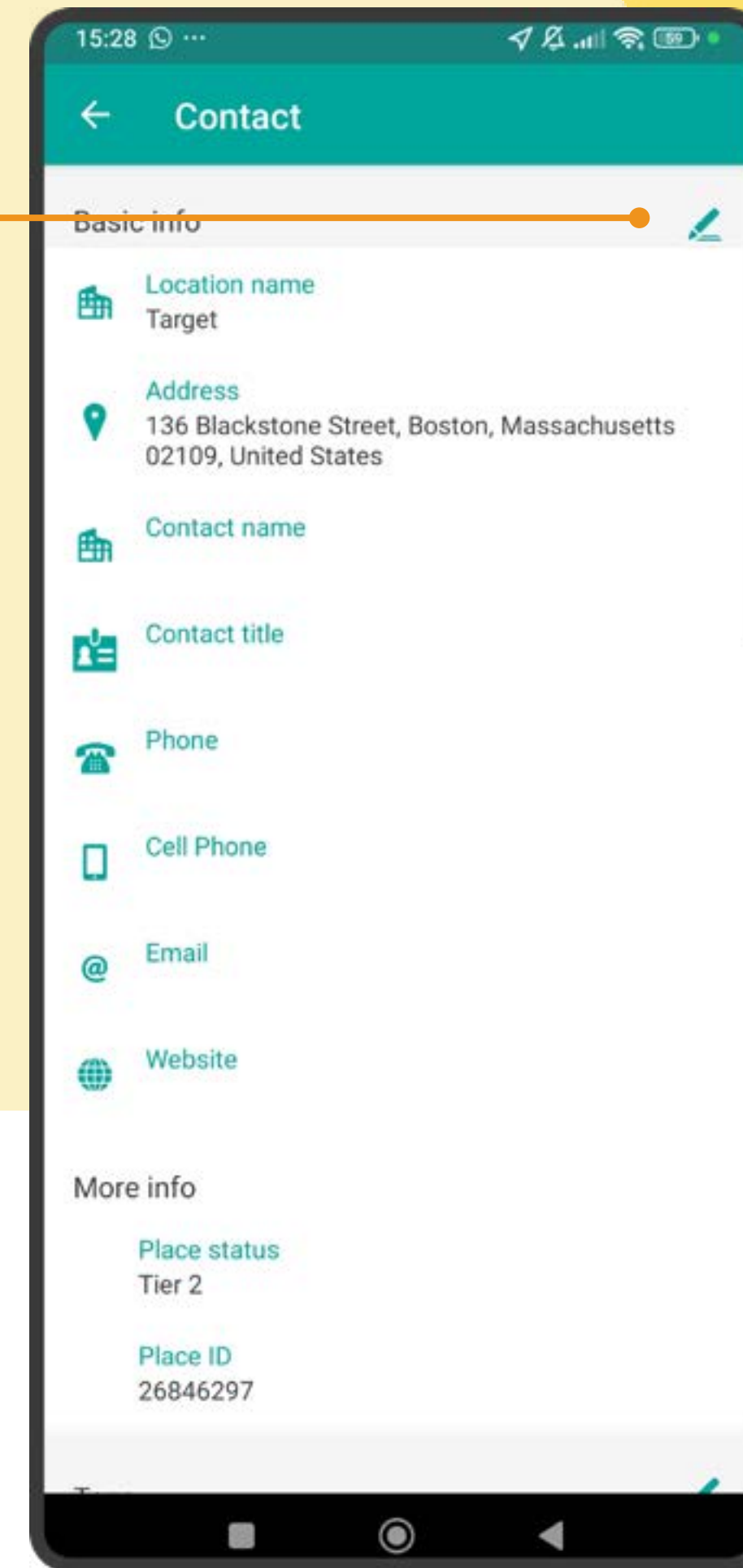
HOW TO FIND AND EDIT PLACE INFORMATION

The Contact tab contains all the contact information for a place, and allows you to easily access and edit info such as tags, custom attributes, phone and cell phone number...

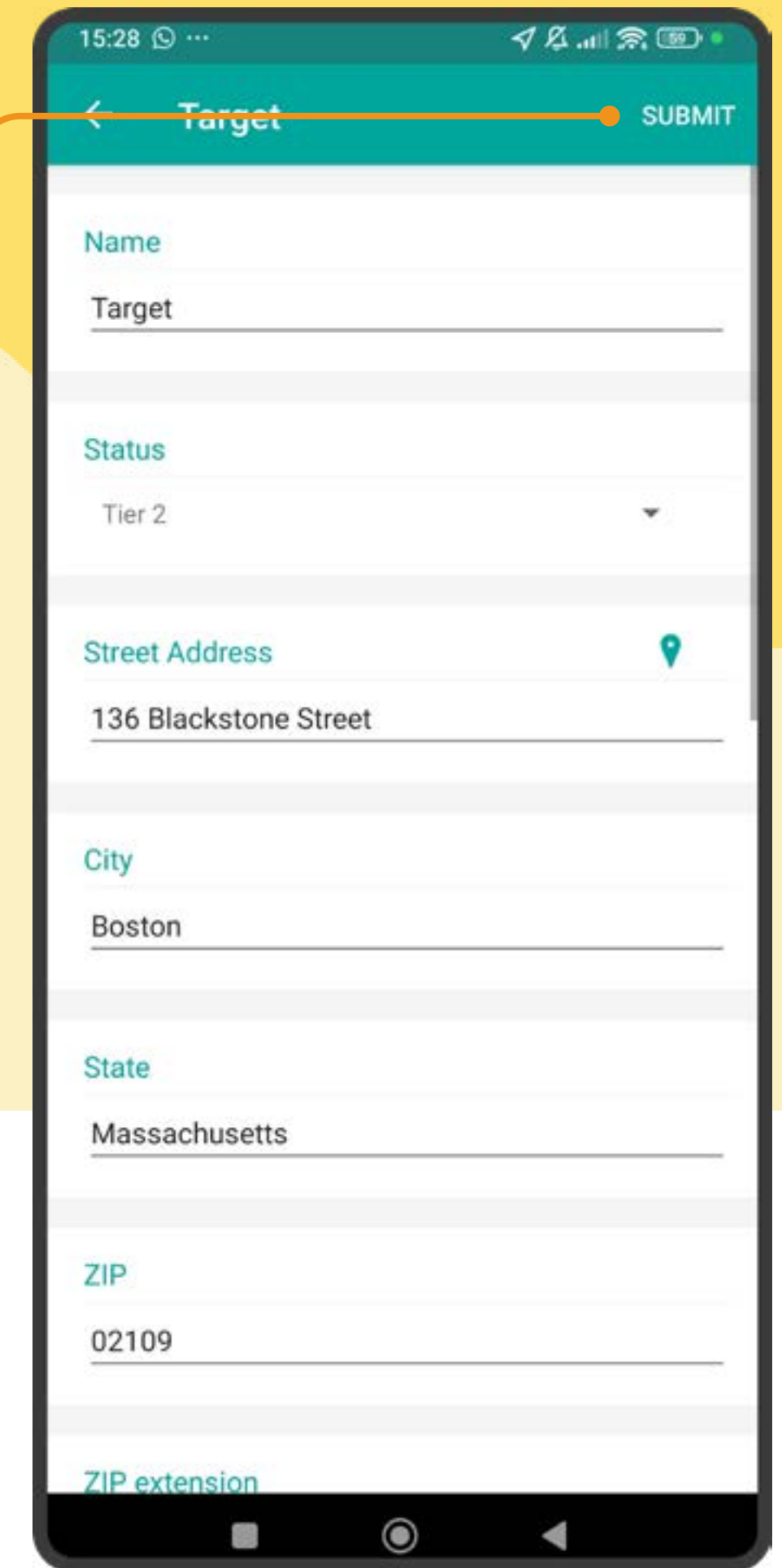
1 Click on the **PLACES** tab and select the place you wish to see from the place's list. Click on the **CONTACT**.



2 Click on **EDIT**, located at the top of the page.



3 Start making changes. After you're done, tap on **SUBMIT**.



28

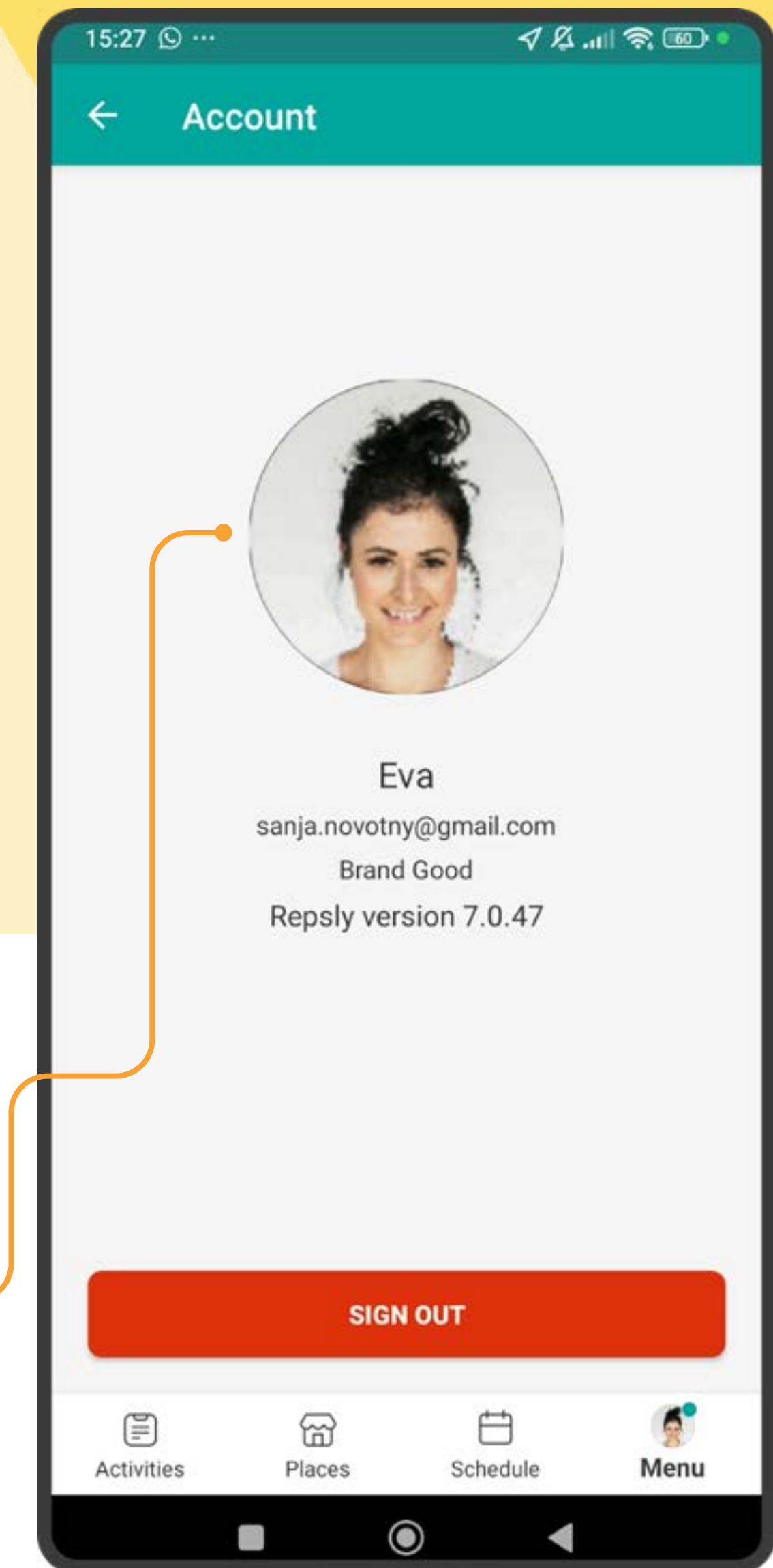
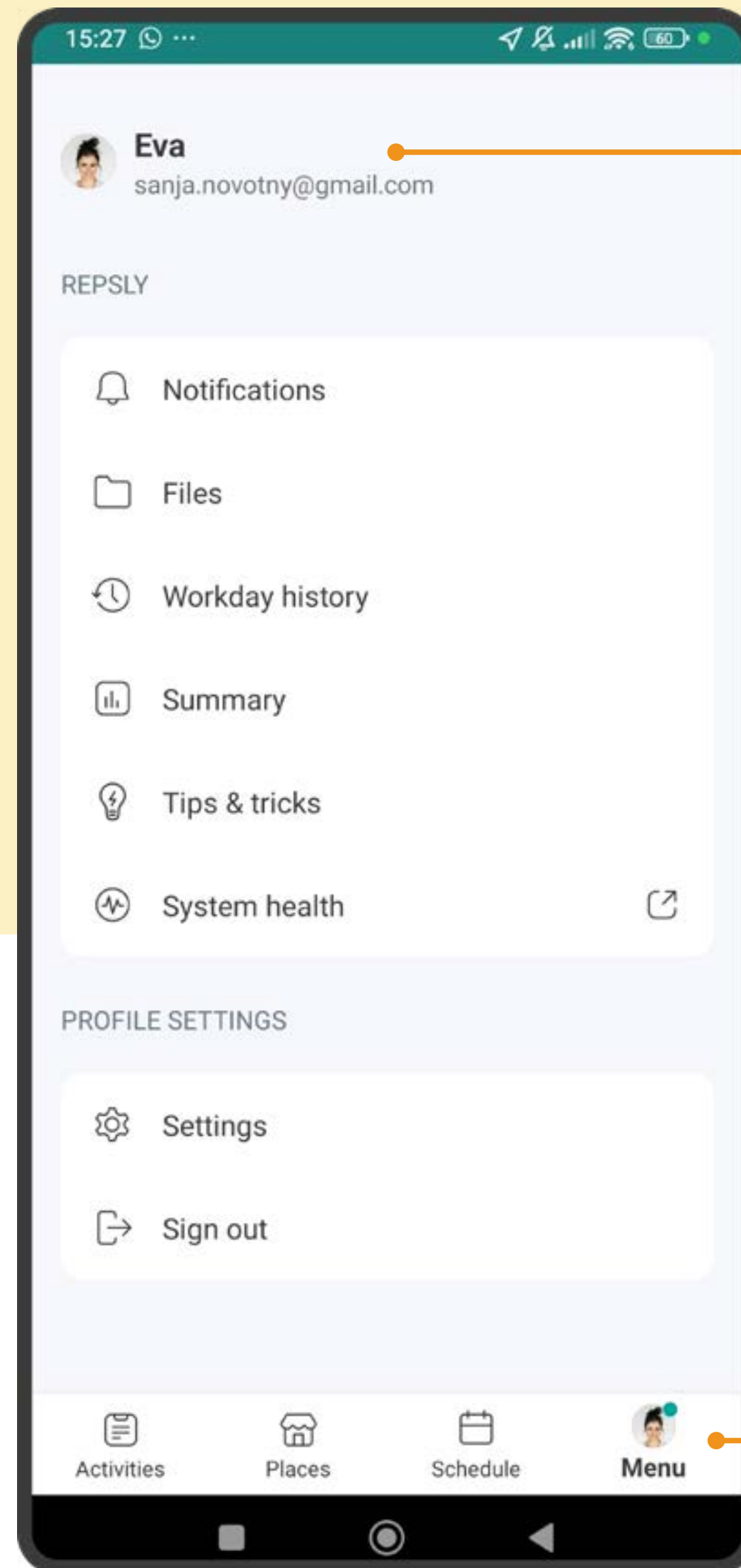
HOW TO UPDATE THE PROFILE PICTURE

Repsly allows you to have a profile picture, which is then visible next to the activities you perform.

1 Open your Repsly app, and tap on **MENU**. After that click on your name.

Click on your profile picture (*choose to take a photo or upload one from your gallery*). Once you've selected your picture, tap **DONE** to set it as your profile photo.

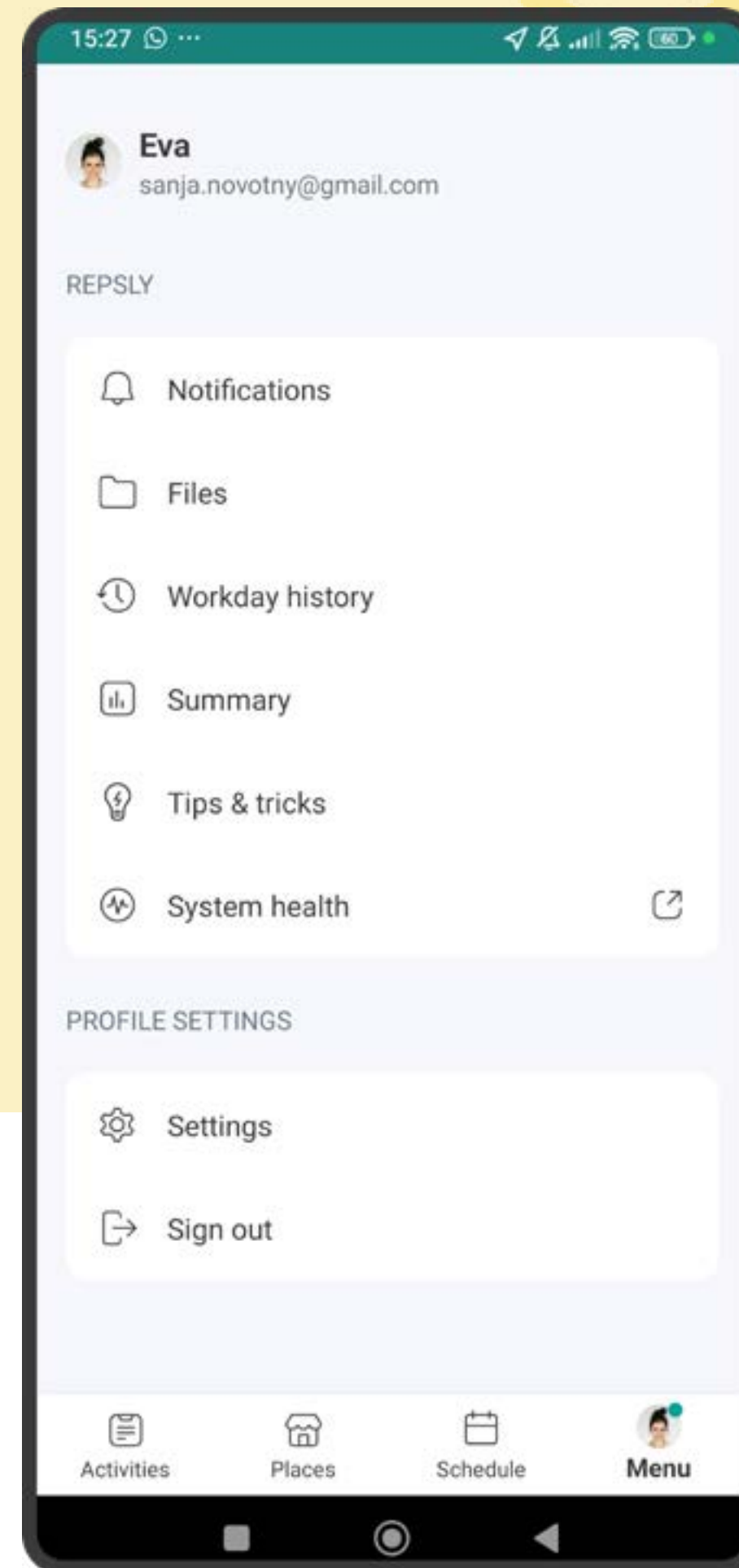
2



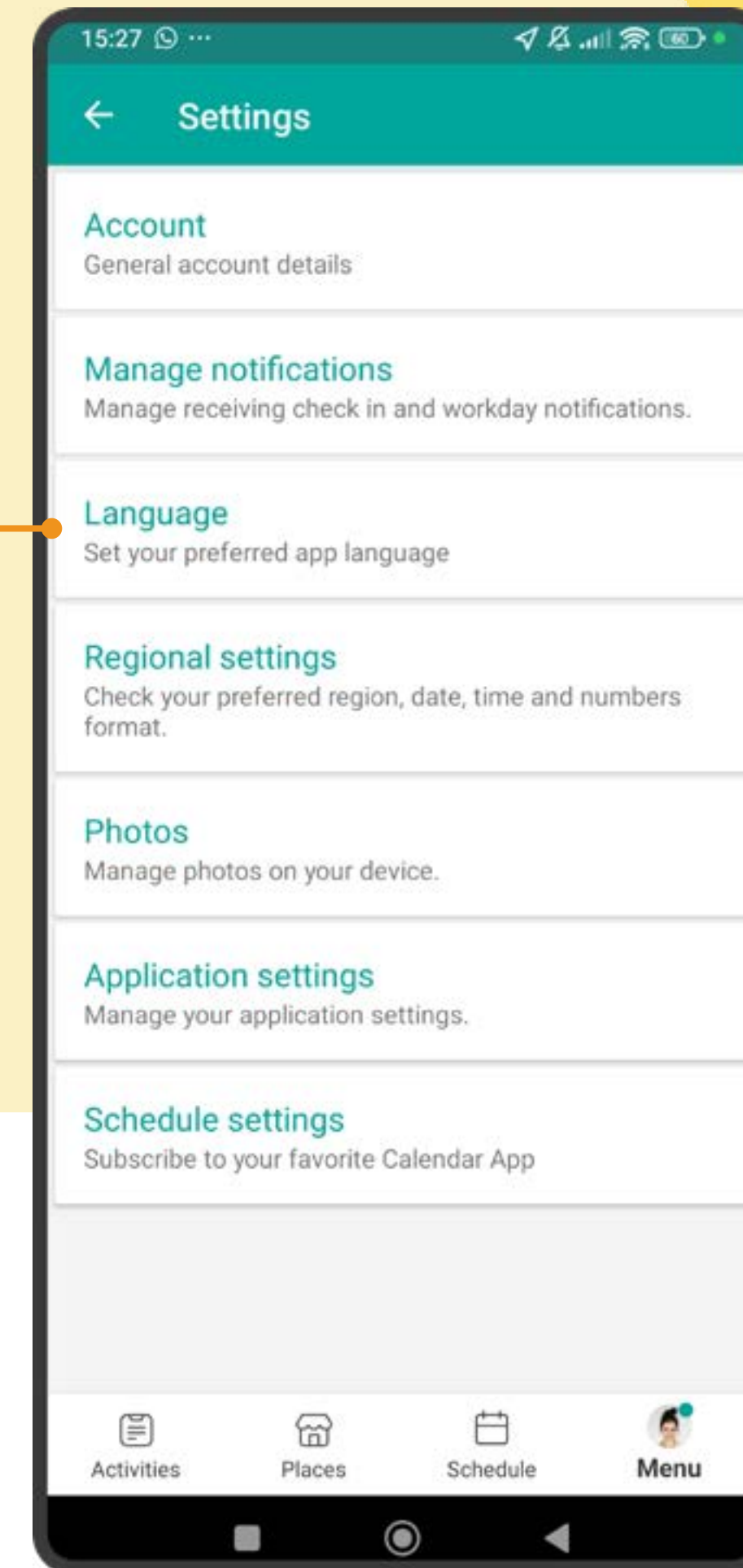
29

HOW TO CHANGE THE LANGUAGE IN REPSLY

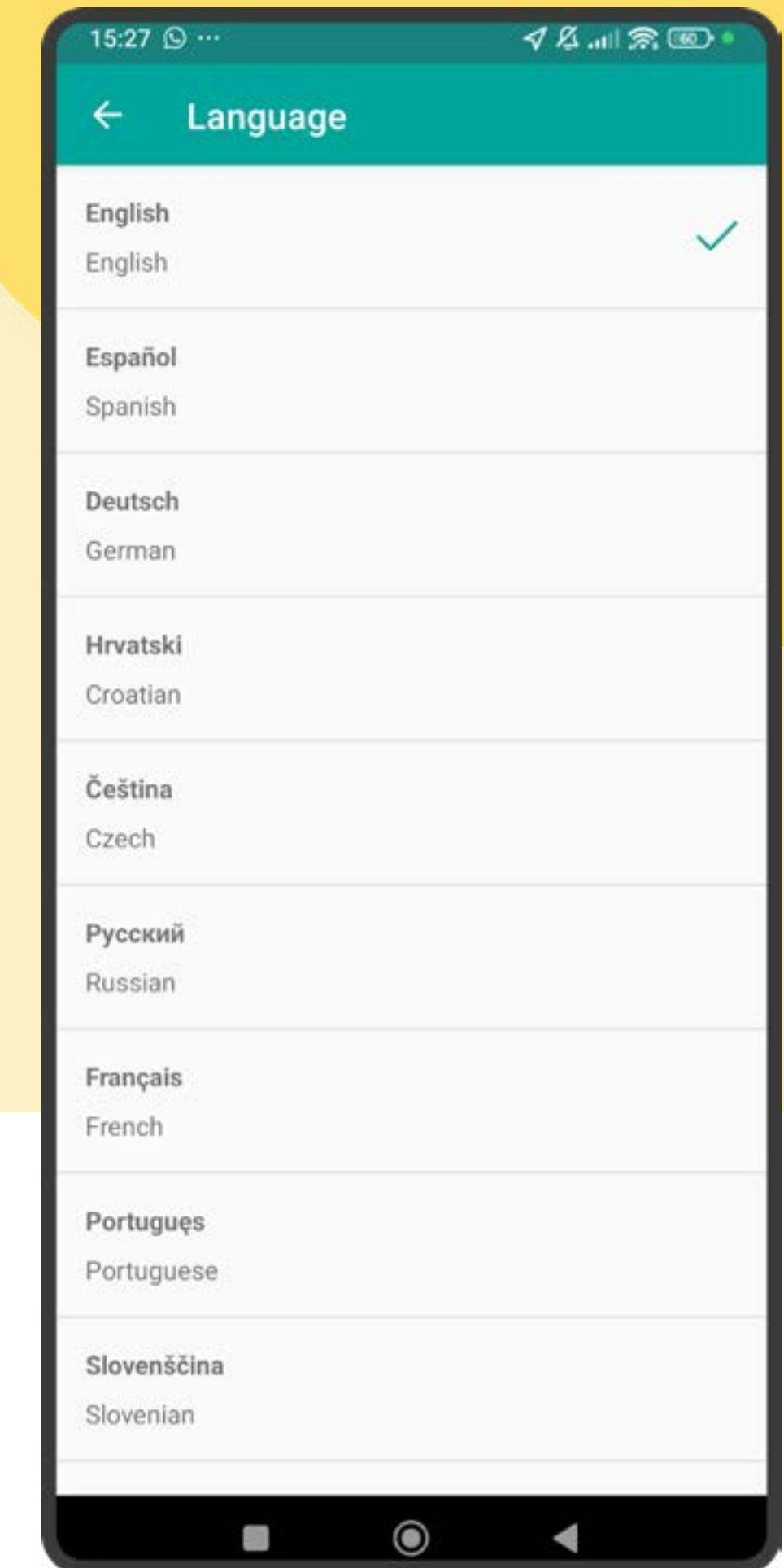
The mobile app language is changed straight from the mobile.



1 Click on **MENU** and select **SETTINGS**.



2 Now click on the **LANGUAGE**.



3 Select which language would you like to have in your Repsly app.

Resources & support

Knowledgebase Library

Articles about best practices on how to use Repsly app.

Review them [here](#).

Or select **MENU** in your Repsly app, tap on **TIPS & TRICKS**. Use search bar to find what you need help with.

Support

If you experience any technical issues, please contact Repsly Support Team at support@repsly.com