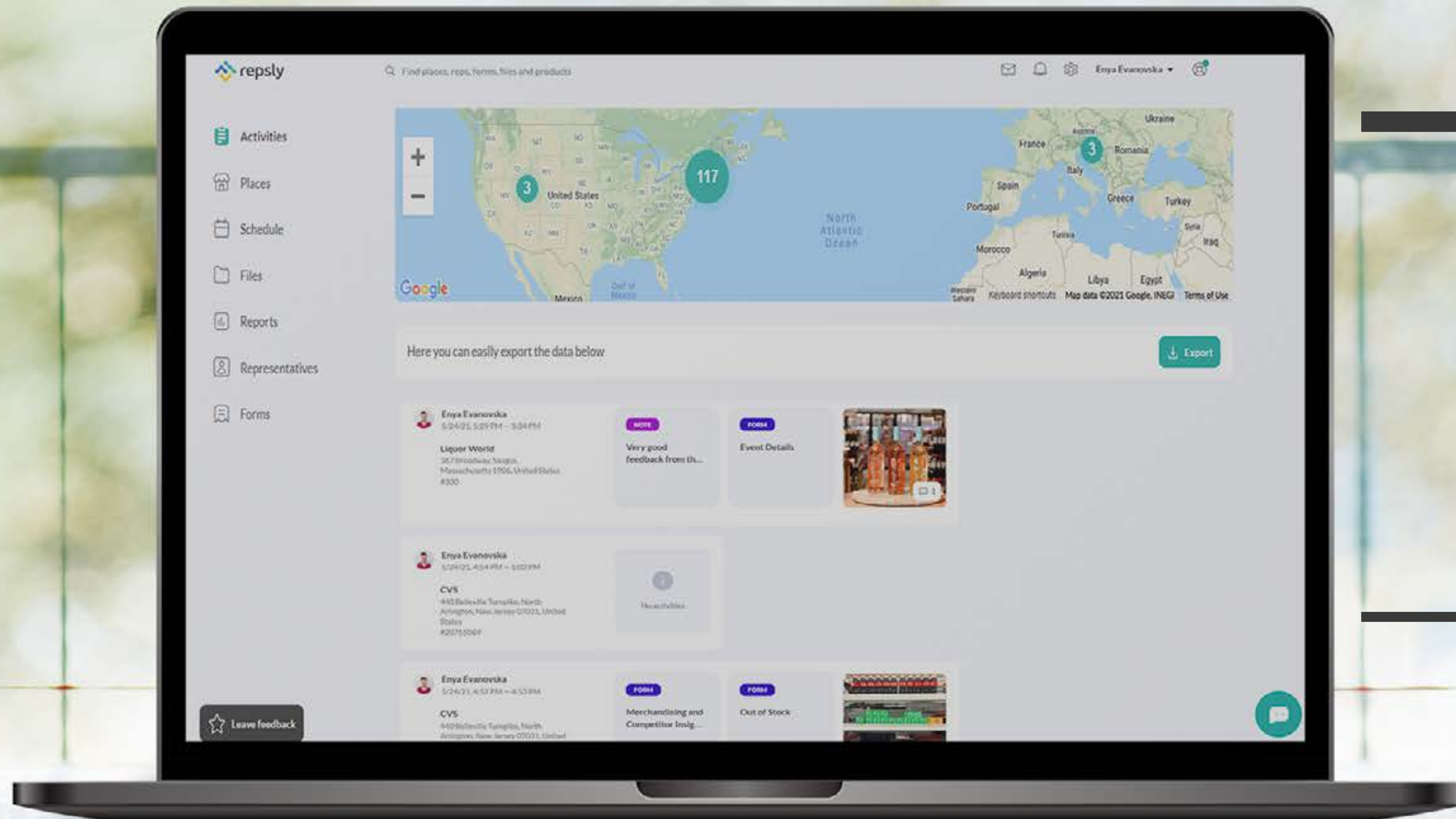




BACKOFFICE MANAGER TRAINING GUIDE

LONG VERSION



HOW TO ADD A NEW BACKOFFICE MANAGER?

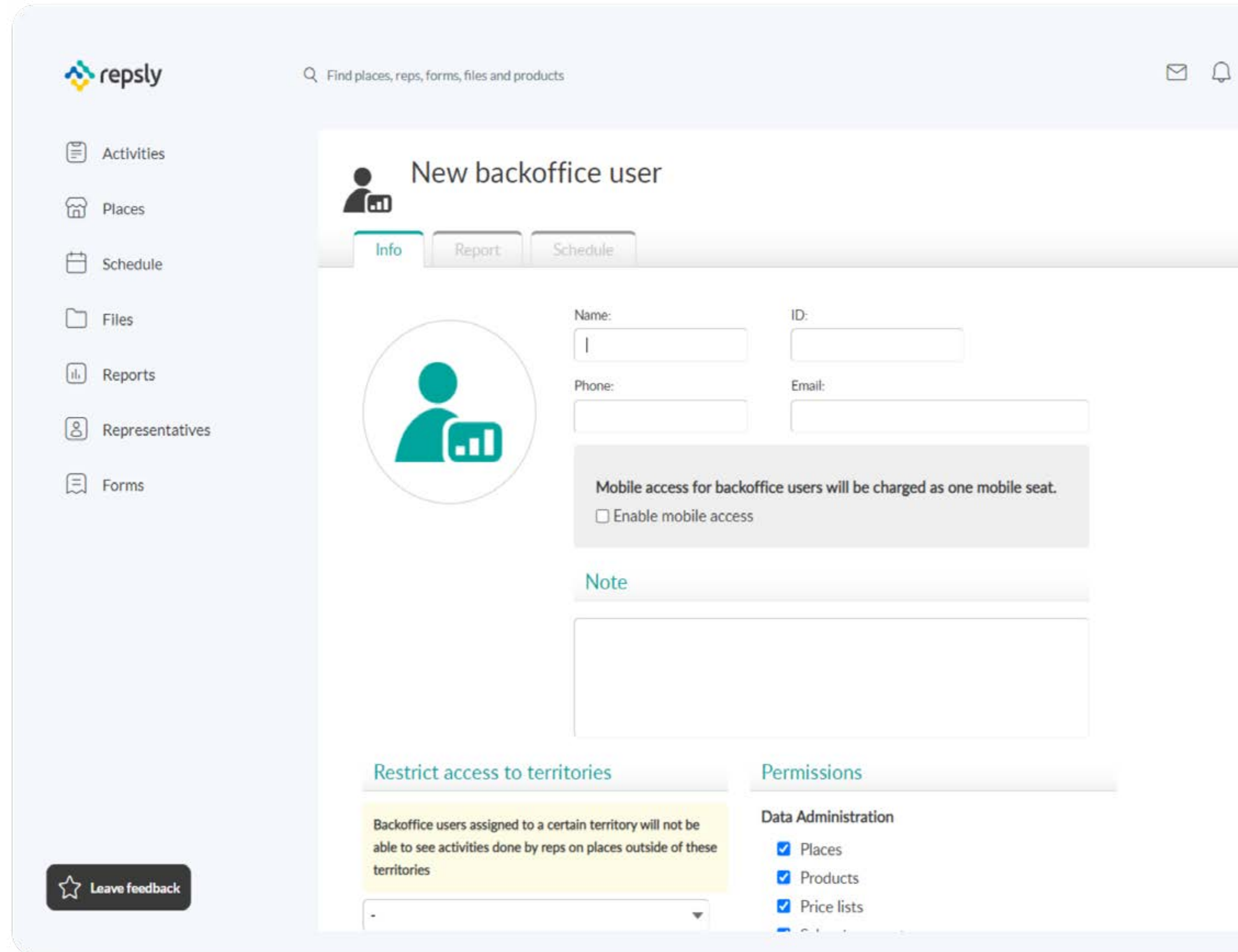
Completing these steps will create an email that we'll send to the new back office user. This email will contain a link which will allow the new user to create a password in order to get into the back office and have complete access.

Click on the **Gear icon** and click on the **Backoffice users**.
Select new User.

1

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

2



The screenshot displays the Repsly Backoffice Manager interface. On the left is a sidebar with navigation icons for Activities, Places, Schedule, Files, Reports, Representatives, and Forms. The main content area is titled 'New backoffice user' and features a user icon placeholder. Below the icon are input fields for Name, ID, Phone, and Email. A note states: 'Mobile access for backoffice users will be charged as one mobile seat.' with a checkbox for 'Enable mobile access'. At the bottom, there are two sections: 'Restrict access to territories' with a warning about territory restrictions and a dropdown menu, and 'Permissions' under 'Data Administration' with checkboxes for Places, Products, Price lists, and Sales.

repsly

Find places, reps, forms, files and products

Activities

Places

Schedule

Files

Reports

Representatives

Forms

New backoffice user

Info Report Schedule

Name: ID:

Phone: Email:

Mobile access for backoffice users will be charged as one mobile seat.

☐ Enable mobile access

Note

Restrict access to territories

Backoffice users assigned to a certain territory will not be able to see activities done by reps on places outside of these territories

Permissions

Data Administration

☒ Places

☒ Products

☒ Price lists

☒ Sales

Leave feedback

HOW TO ADD A NEW REPRESENTATIVE?

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

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

1

The screenshot shows the Replsly Backoffice Manager interface. On the left is a sidebar with navigation tabs: Activities, Places, Schedule, Files, Reports, **Representatives** (highlighted), and Forms. The main content area is titled 'Representatives' with the subtitle 'Manage your team of field representatives'. In the top right of this panel is a green button labeled '+ NEW REPRESENTATIVE'. Below this is a search bar 'Search reps' and an 'Add more filters' link. A table lists representatives with columns: NAME, TERRITORY, LATEST ACTIVITY, LAST SYNC TIME, CURRENT STATUS, and ACTIVE. Two representatives are listed: Enya Evanovska and Even Hartvig. At the bottom of the panel is an 'EXPORT' button. A yellow dotted line with a large '1' in a yellow circle points to the '+ NEW REPRESENTATIVE' button.

NAME	TERRITORY	LATEST ACTIVITY	LAST SYNC TIME	CURRENT STATUS	ACTIVE
Enya Evanovska sanja.novotny@repsly.com	Territory, USA...	6/1/2021 3:49 PM	06/18/2021 1:36 PM	Not working	✓
Even Hartvig novotnysanja@gmail.com		5/24/2021 4:31 PM	05/24/2021 4:31 PM	Not working	✓

Enter the Rep's contact information.

2

Activation data will allow them to access the mobile application.

3

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

4

The screenshot shows the 'New representative' form in the Repsly Backoffice Manager. The form is divided into three tabs: 'Info', 'Report', and 'Schedule'. The 'Info' tab is selected and contains the following fields:

- Name:** A text input field with the letter 'I' entered.
- ID:** A text input field with the value '429426'.
- Phone:** A text input field.
- Email:** A text input field.
- active rep:** A checkbox that is checked.
- Territory:** A dropdown menu with a downward arrow.

Below the 'Info' tab is a section titled 'Home address' with the following fields:

- Address:** A text input field.
- Address 2:** A text input field.
- City:** A text input field.
- State:** A text input field.
- ZIP:** A text input field.
- Country:** A text input field.
- Country code:** A text input field.

At the bottom left of the form, there is a button labeled 'Leave feedback' with a star icon.

HOW TO CHANGE THE LANGUAGE ON THE WEB APP?

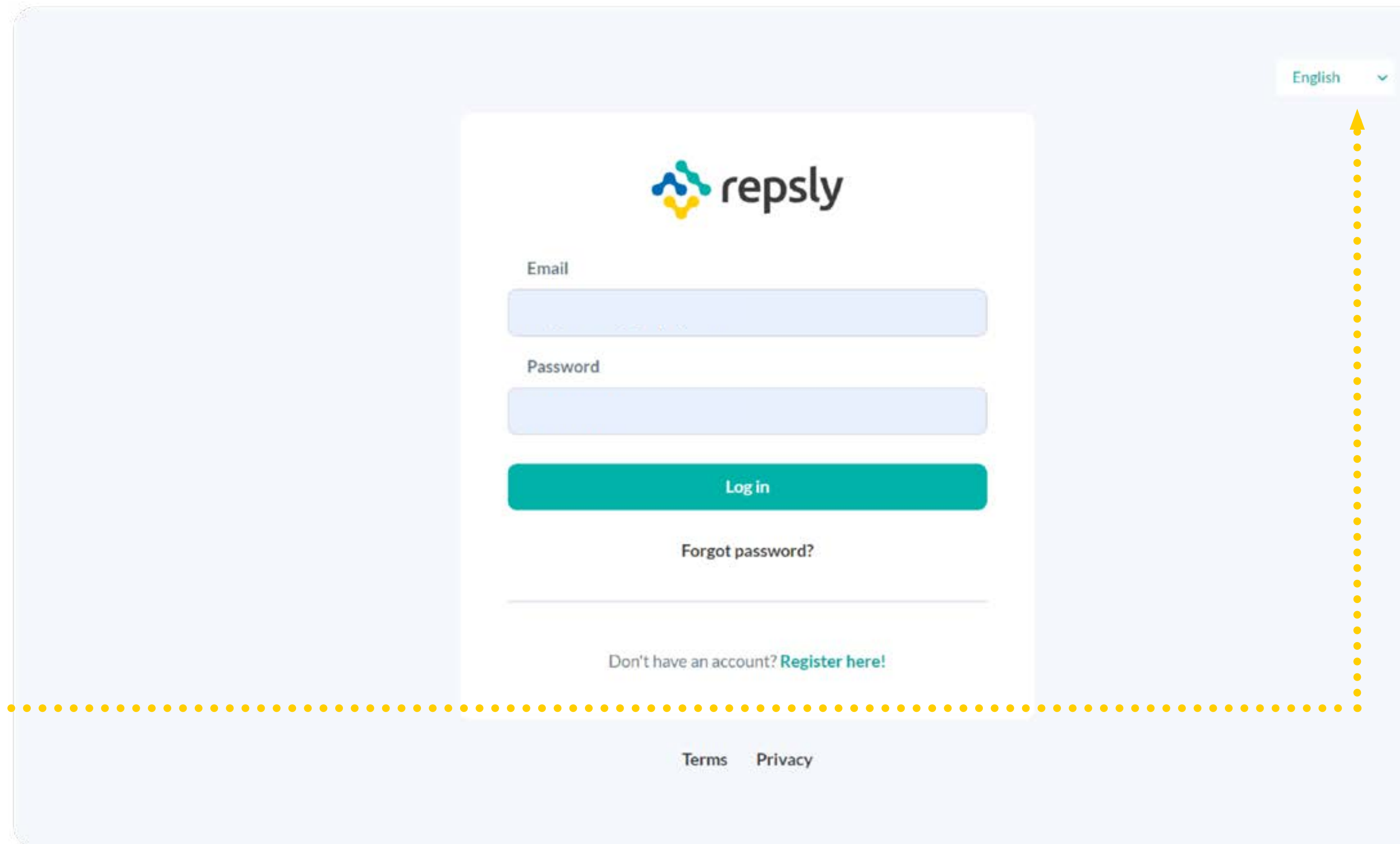
The Backoffice user has the capability to change the Web app's default language. This allows Backoffice Managers to see all features of the Web app in a specific language.

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.

1

2



HOW TO ENTER A NEW PLACE?

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

1

Fill out all the required data - name and address.

2

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**.

3

The screenshot shows the 'New place' form in the Replsly backoffice. The form is titled 'New place' and has three tabs: 'Contact info', 'Report', and 'Schedule'. The 'Contact info' tab is active. It contains the following fields:

- Name:** A text input field.
- ID:** A text input field with the value '1'.
- active place:** A checkbox that is checked.
- Representatives:** A dropdown menu showing 'There are no reps assigned to this place'.
- Status:** A dropdown menu.
- Territory:** A dropdown menu with a search bar. The search bar contains 'I'. The dropdown list shows 'Territory' with sub-items: 'USA', 'Merchandising Team', 'Northeast', and 'North'.

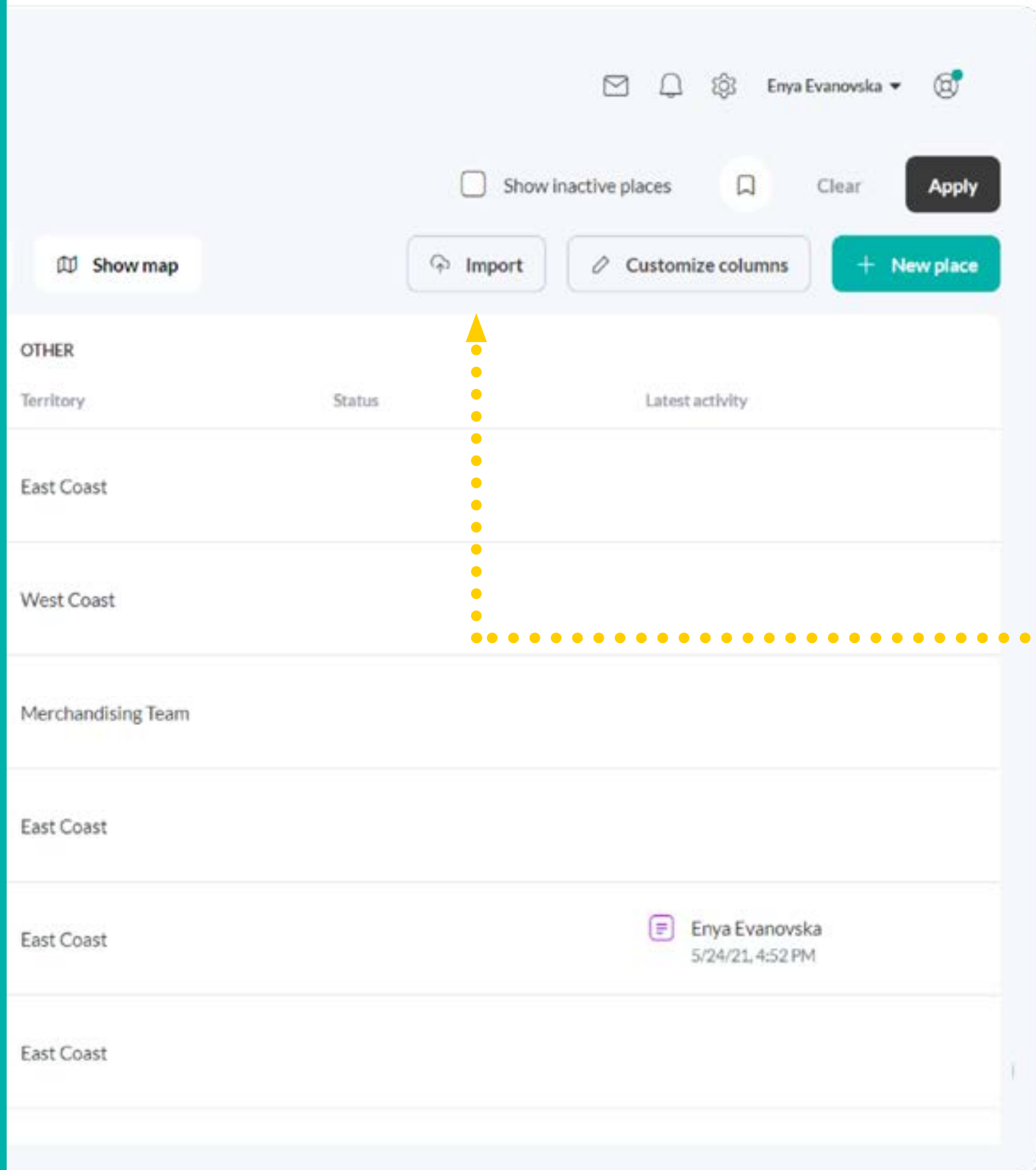
Below the 'Contact info' section is the 'Place price lists' section, which is currently empty. Below that is the 'Address info' section, which contains the following fields:

- Address:** A text input field.
- City:** A text input field.
- State:** A text input field.
- ZIP:** A text input field.
- Country:** A text input field.
- Country code:** A text input field.

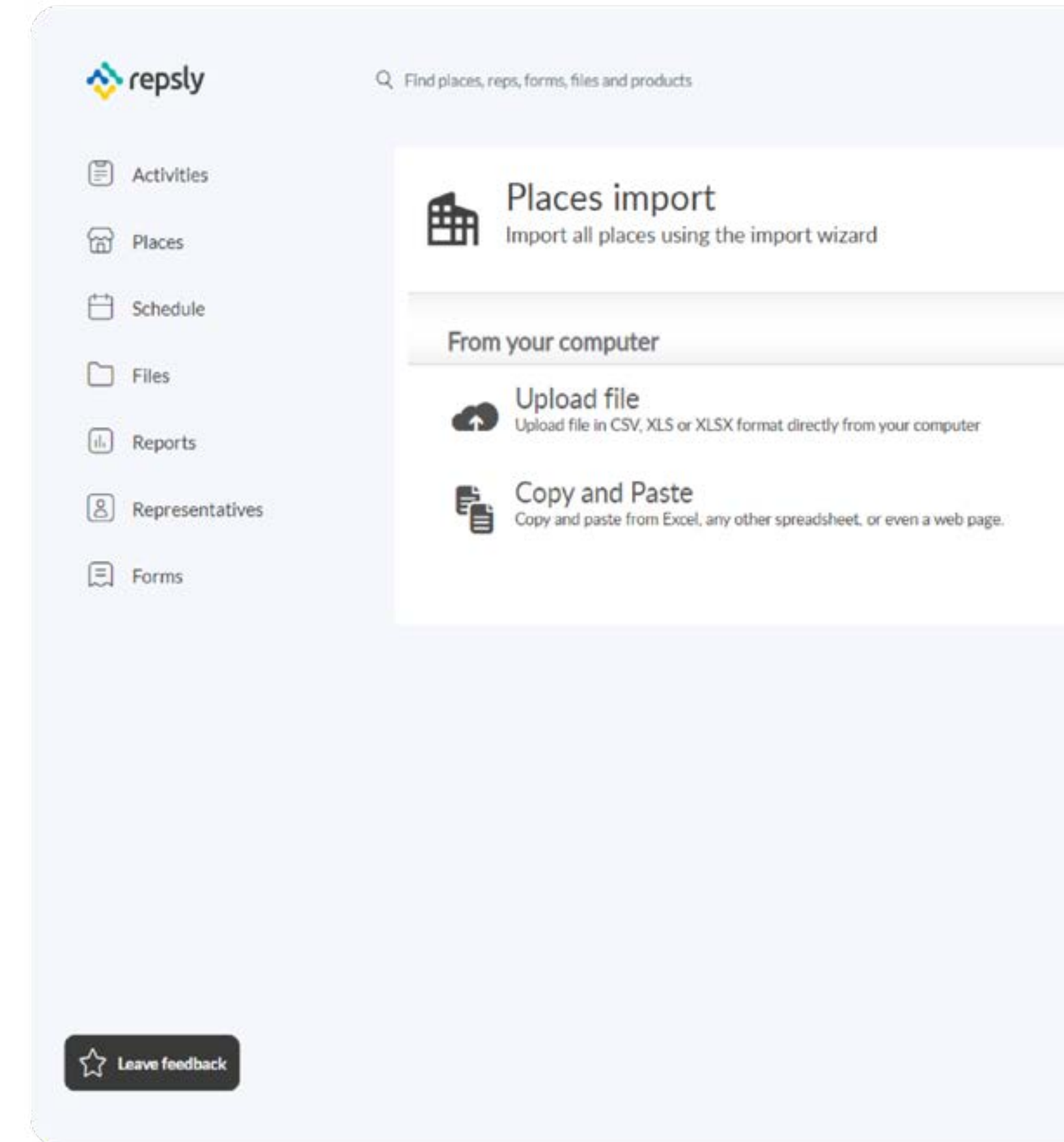
At the bottom of the form, there are two sections: 'Note' and 'Tags'. The 'Tags' section has an 'Add tags' button. On the left sidebar, there are navigation links: 'Activities', 'Places', 'Schedule', 'Files', 'Reports', 'Representatives', and 'Forms'. At the bottom left, there is a 'Leave feedback' button. On the right side, there is a 'Place ID is place.' warning and a 'Territory' dropdown menu.

HOW TO IMPORT PLACE LISTS INTO REPSLY?

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



- 1 Select **Places tab**. where you can see **Import** option.
- 2 From the import page, choose whether to copy and paste or upload from excel.
- 3 Once the spreadsheet has been loaded, click **Continue**. This will allow you to review all of your imported data before uploading.



HOW TO ADD CUSTOM PLACE FIELDS TO YOUR CONTACT INFO?

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

1

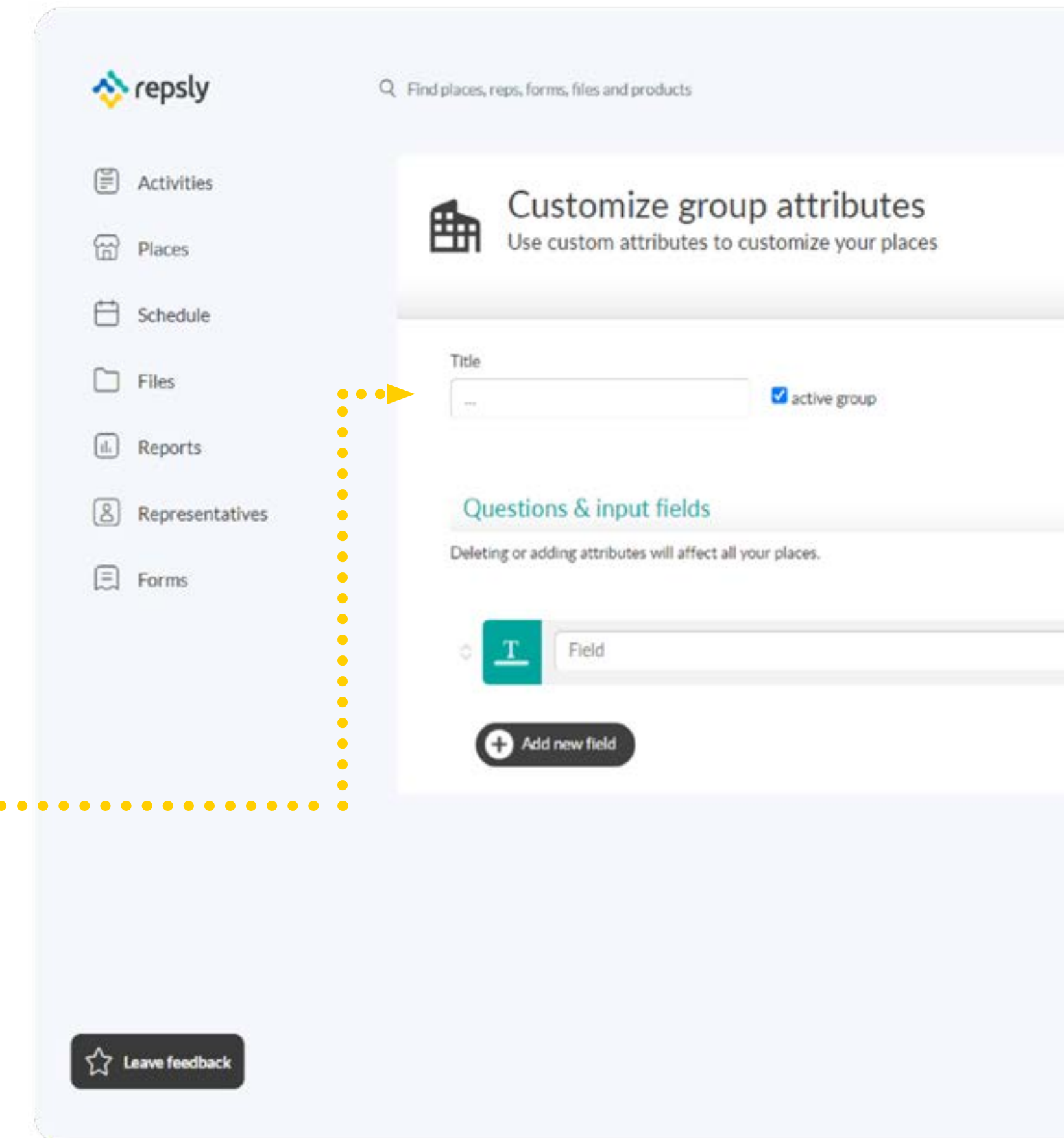
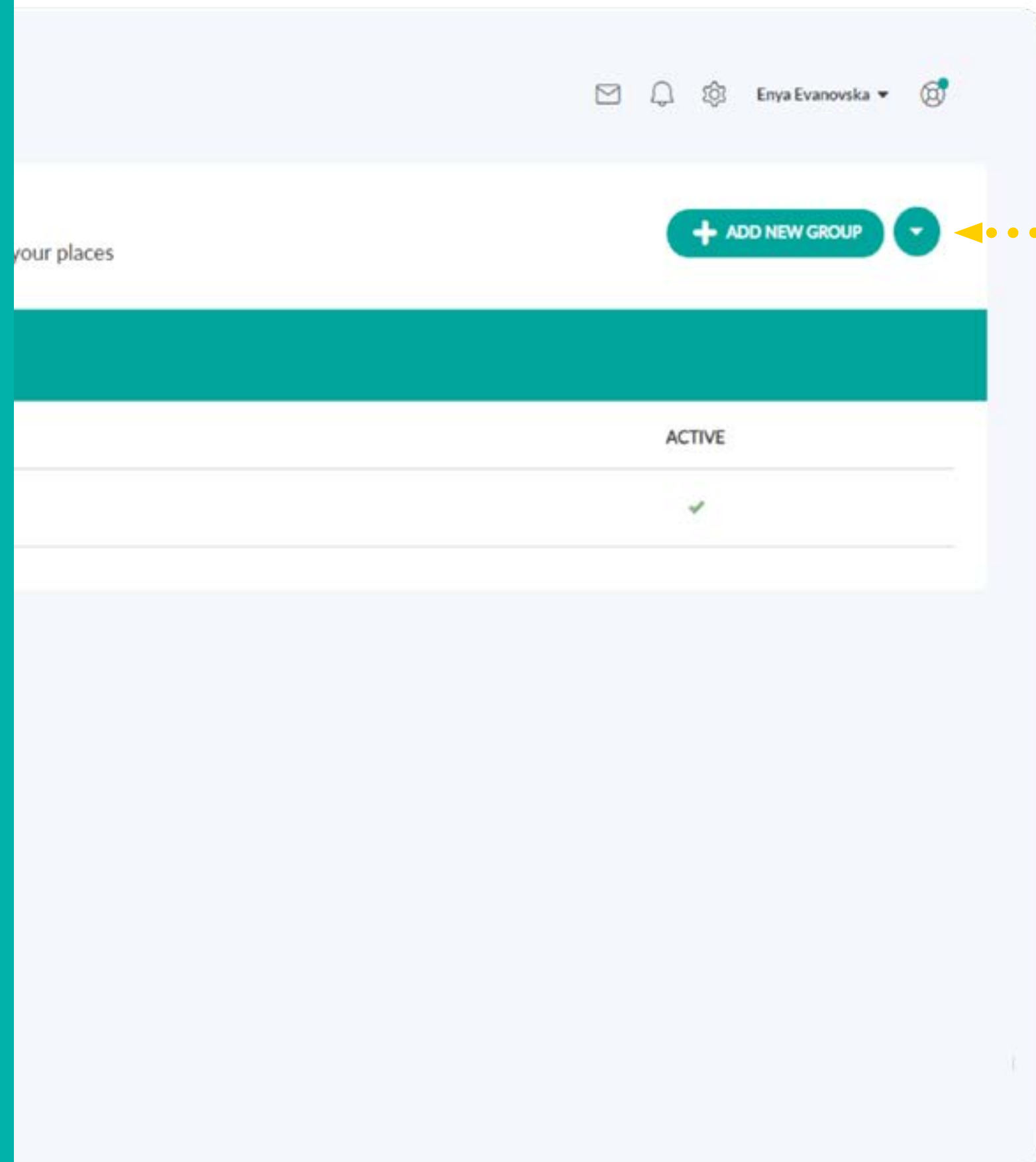
Click on the **Gear Icon** and select **Custom Attributes**.

2

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

3

Once you have added all of your necessary fields always remember to click **Save**.



HOW TO LIMIT MANAGERS TO INDIVIDUAL TERRITORY?

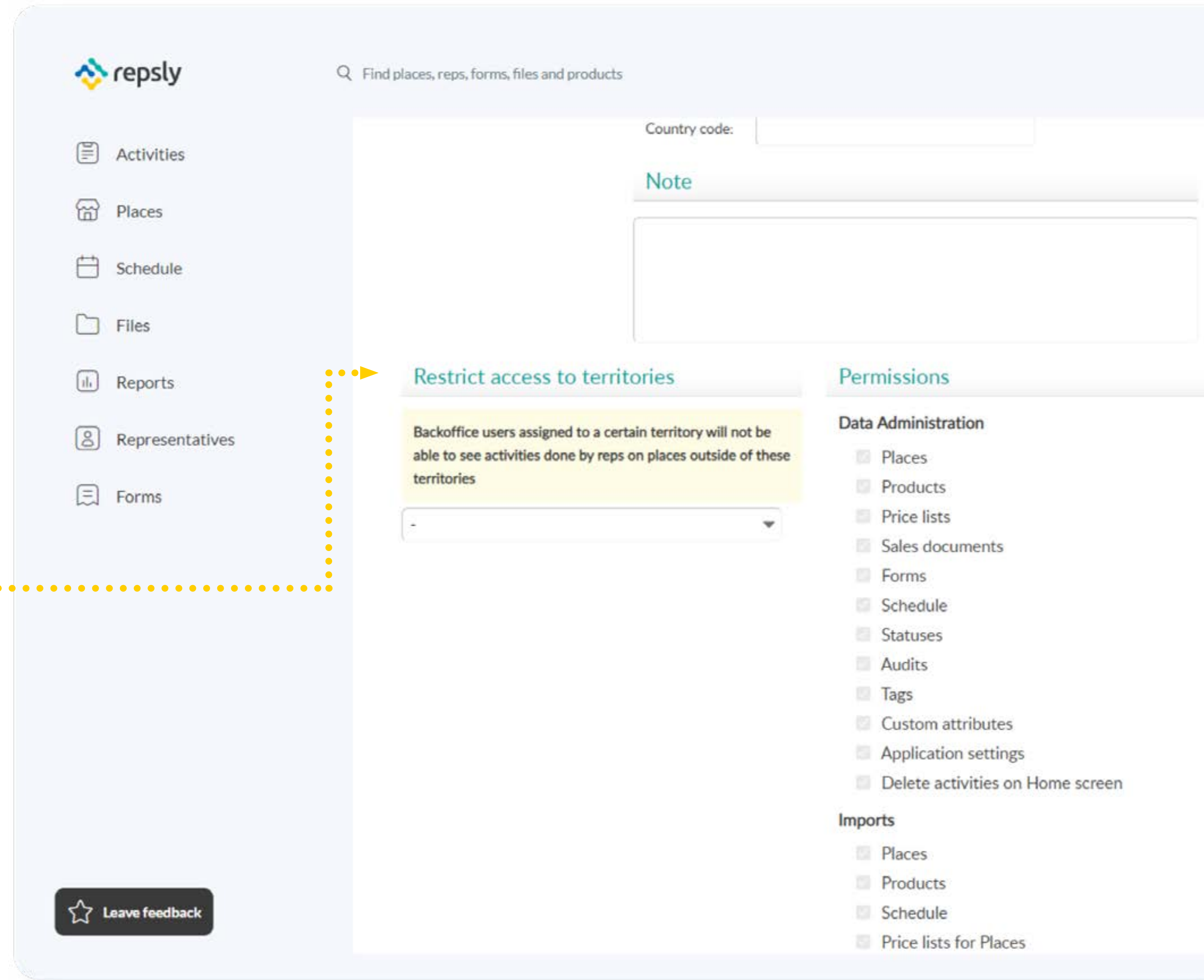
Repsly makes it possible to assign a territory to another manager so that when the Territory Manager logs in, they will only be able to see data from their specific territories.

Click on the **Gear Icon**, then click on **Backoffice users** and select the Backoffice manager to limit.

1

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

2



HOW TO CREATE A NEW FORM?

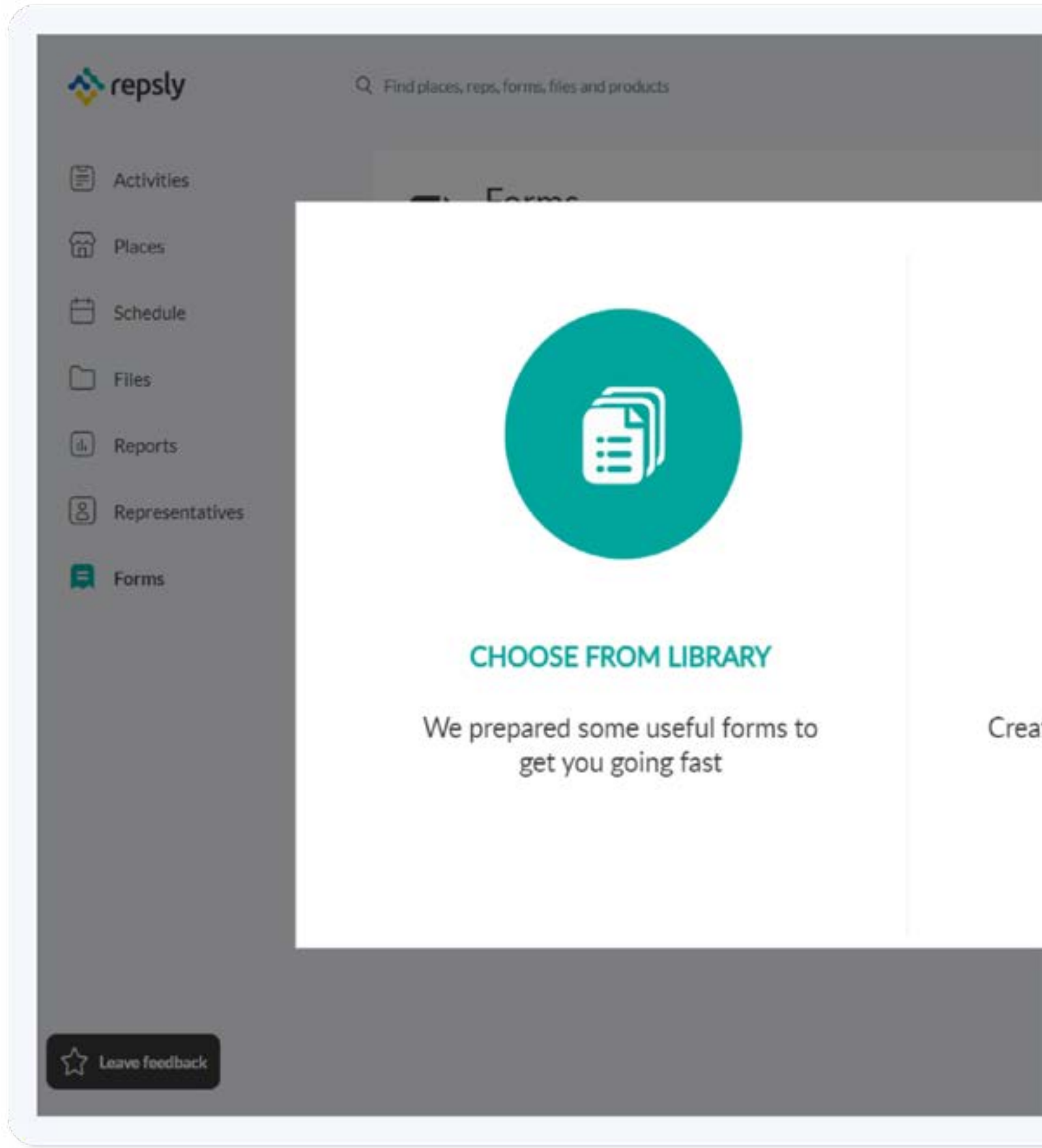
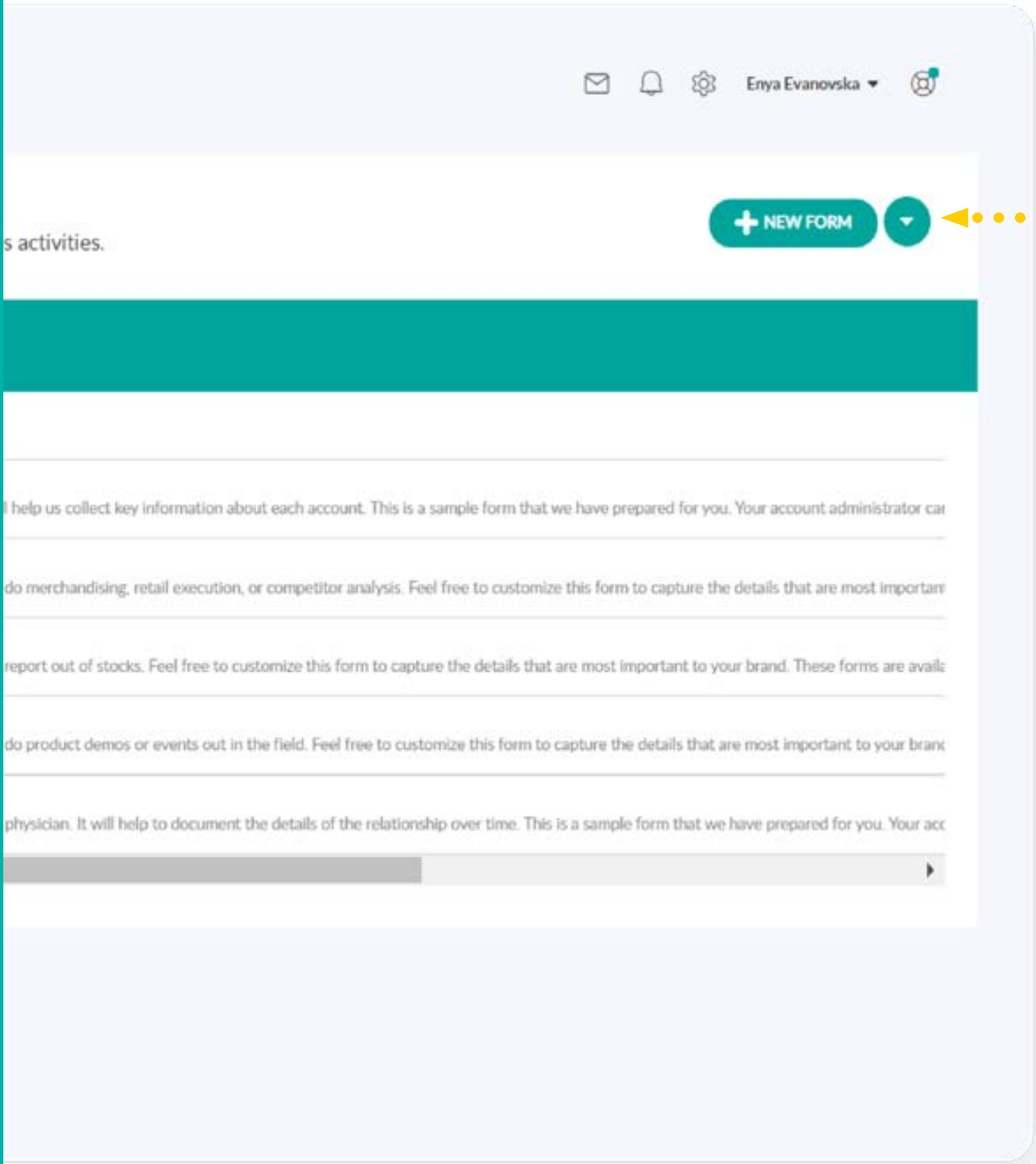
The Forms feature allows management to create documents that can be filled out by the representatives in the field, allowing for real-time data collection.

1

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

2

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



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.

3

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.

4

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

5

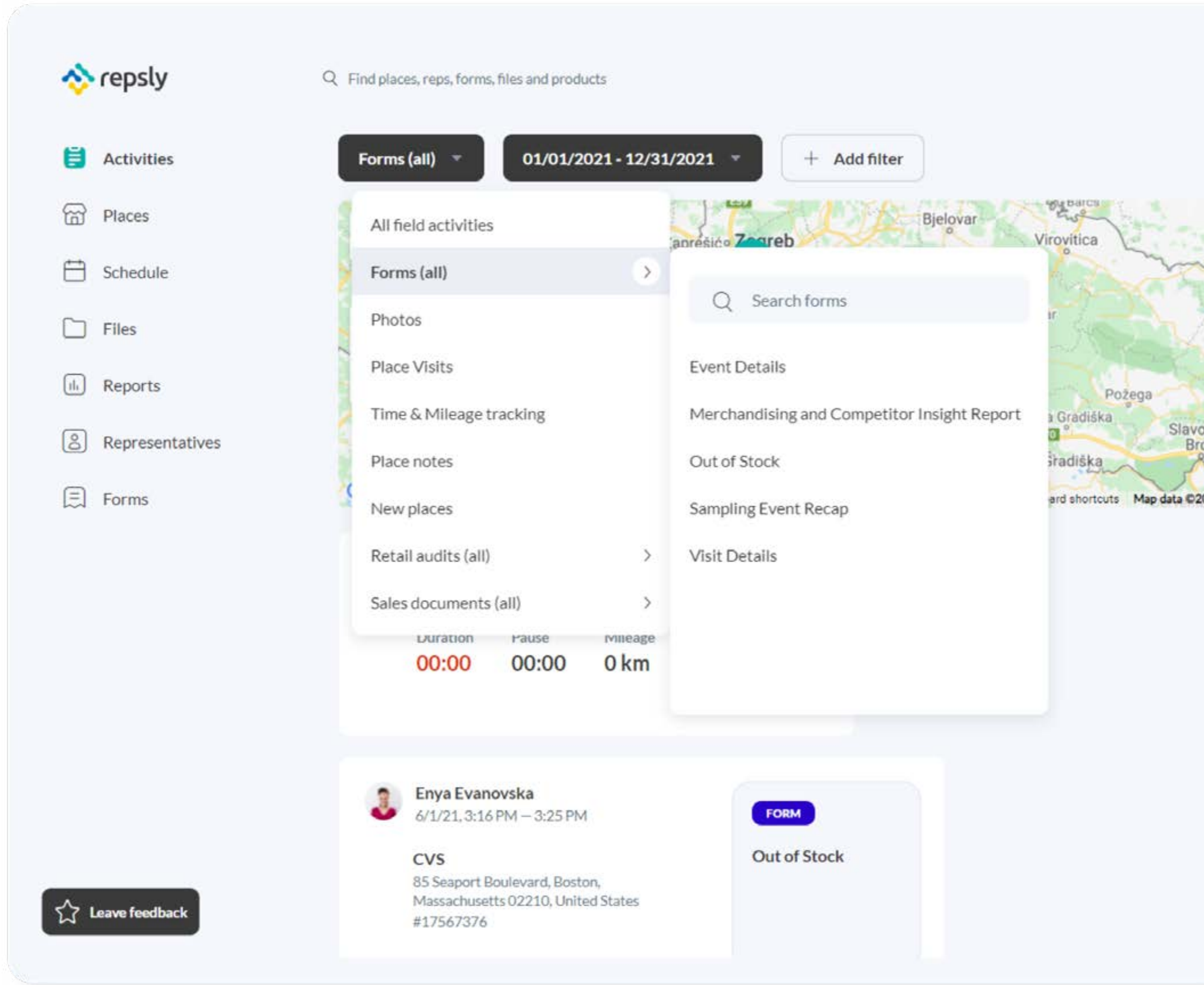
The screenshot shows the Repsly web application interface for creating a new form. On the left is a sidebar with navigation icons and labels: Activities, Places, Schedule, Files, Reports, Representatives, and Forms (which is highlighted). At the bottom of the sidebar is a 'Leave feedback' button. The main content area has a search bar at the top with the placeholder text 'Find places, reps, forms, files and products'. Below the search bar is a header for the 'Forms' section, including a document icon and the text 'Use forms to keep record of your reps activities.' The form creation fields include a 'Title:' label with a text input field, a checked 'active form' checkbox, and an unchecked 'Auto-fill on open' checkbox. Below these is a 'Description:' label with a larger text area. Further down are two sections: 'Set form accessibility' and 'Connected to places with any of these tags:', which includes a button labeled 'All places' and a text input 'Start typing a place tag'. Below that is 'Visible to these reps:' with a button labeled 'All reps' and a text input 'Start typing rep's name'. At the bottom of the visible form fields is a link labeled 'Questions & input fields'.

HOW TO EDIT A SUBMITTED FORM IN THE WEB APP?

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

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

1



Select a form you want to edit.

2

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**.

3

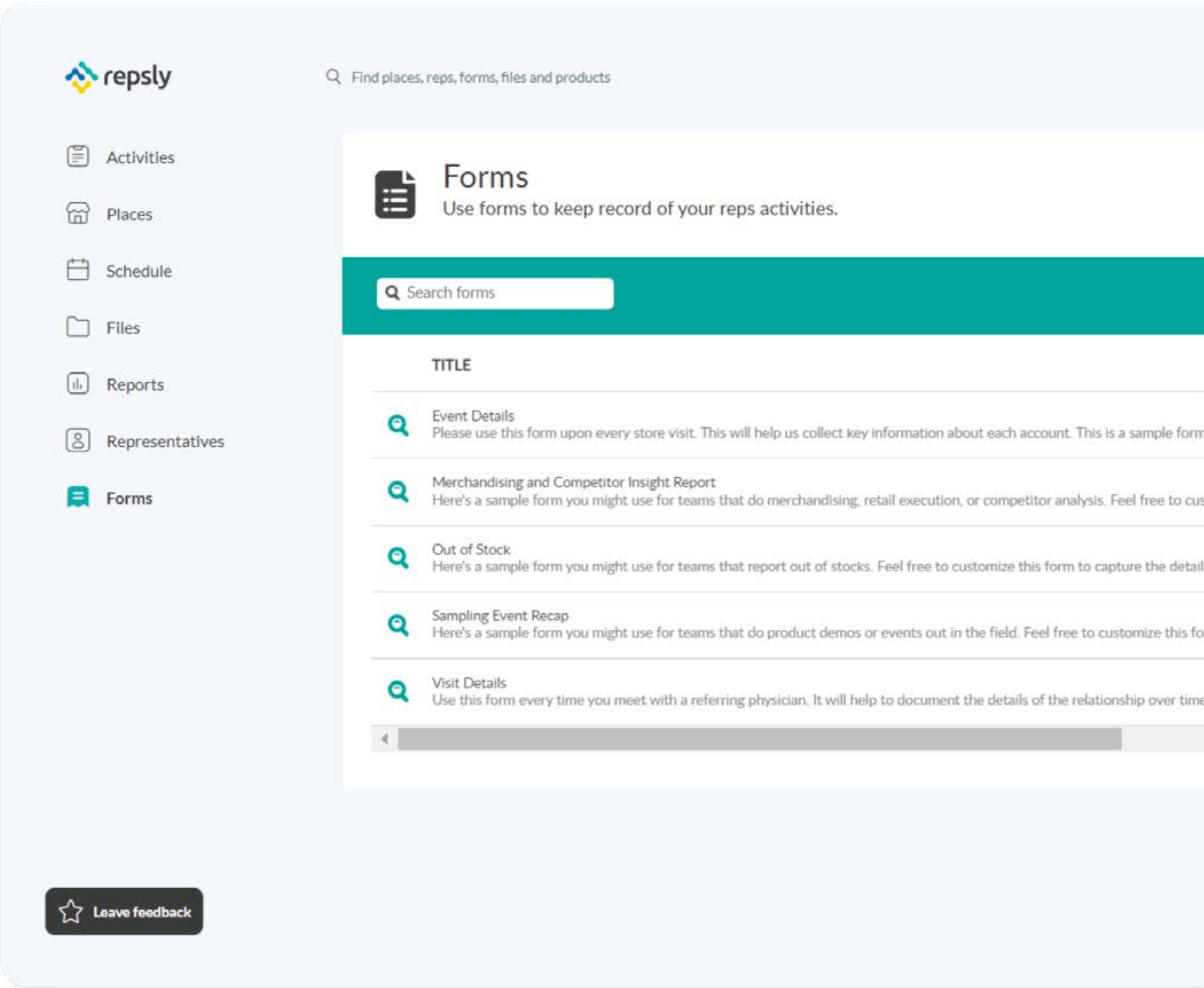
The screenshot shows a web application interface for 'Out of Stock at CVS'. On the left is a sidebar menu with icons and labels for 'Activities', 'Places', 'Schedule', 'Files', 'Reports', 'Representatives', and 'Forms'. The main area displays a form with the following fields: 'What product is out of stock?' (a dropdown menu showing 'Product D'), 'Scan bar code of product' (an empty text input), 'Quantity needed' (a text input with the value '10'), 'Photo of shelf' (a text input with 'No photo taken' and an upload icon), and 'Signature' (a large text area containing a handwritten signature). On the right side of the form, there is a user profile for 'Enya Evanovska CVS' with the address '85 Seaport Boulevard Boston, United States' and a 'Write a comment' button. At the bottom of the interface, there is a 'Leave feedback' button with a star icon, and a footer section containing the name 'Veronika Vrbani' and address '42 Malogorička ulica, Zagreb, 10110, Croatia', along with a tab labeled 'Out of Stock'.

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.

1



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.

2

3

repsly

Find places, reps, forms, files and products

Activities

Places

Schedule

Files

Reports

Representatives

Forms

Forms

Use forms to keep record of your reps activities.

Title:

Event Details

☒ active form

☐ Auto-fill on open

Description:

Please use this form upon every store visit. This will help us collect key information about each account.

This is a sample form that we have prepared for you. Your account administrator can can customize this form to meet your specific needs using Repsly's form editor.

Set form accessibility

Connected to places with any of these tags:

All places Start typing a place tag

Visible to these reps:

All reps Start typing rep's name

Questions & input fields

Leave feedback

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.

1

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

2

The date filter allows you to filter by date range.

3

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.

4

The screenshot displays the Replsly Backoffice Manager interface. On the left, a sidebar contains navigation icons for Activities, Places, Schedule, Files, Reports, Representatives, and Forms. The main area features a search bar at the top with the text "Find places, reps, forms, files and products". Below the search bar, there are three filter buttons: "All field activities", "01/01/2021 - 12/31/2021", and "+ Add filter". A dropdown menu is open under "All field activities", listing options: "Forms (all)", "Photos", "Place Visits", "Time & Mileage tracking", "Place notes", "New places", "Retail audits (all)", and "Sales documents (all)". To the right of the dropdown is a map of Croatia with a red pin labeled "18" near Zagreb. Below the map, there are two activity cards. The first card shows a location "85 Seaport Boulevard, Boston, Massachusetts 02210, United States #17567376" and a "FORM Out of Stock" button. The second card shows a profile for "Terry Quentin" with a date range "5/31/21, 6:20 PM - 7:49 PM" and another "FORM Out of Stock" button. At the bottom left, there is a "Leave feedback" button.

HOW TO VIEW REP SUMMARY REPORT?

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

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

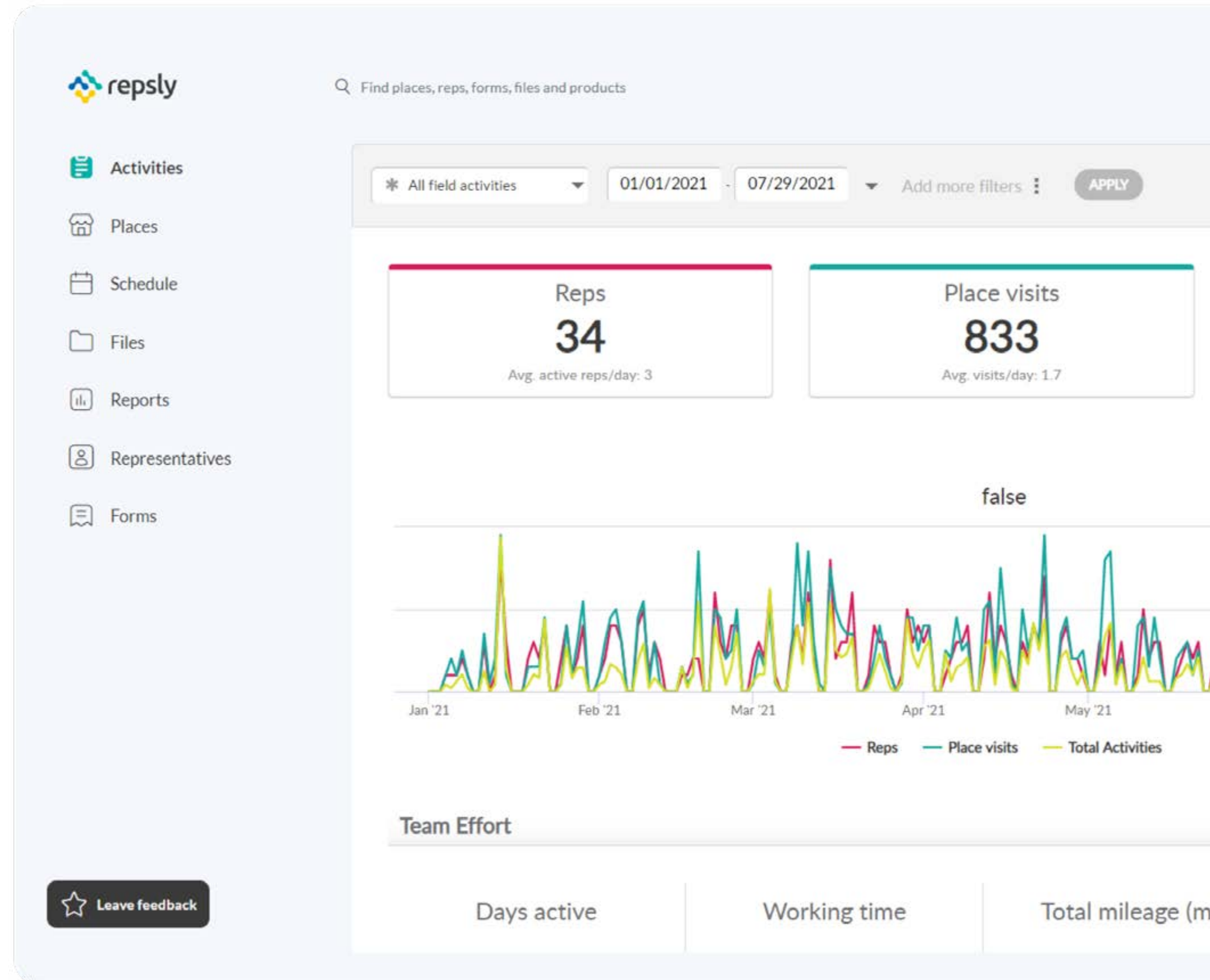
1

Click on a **Reports tab**.

2

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

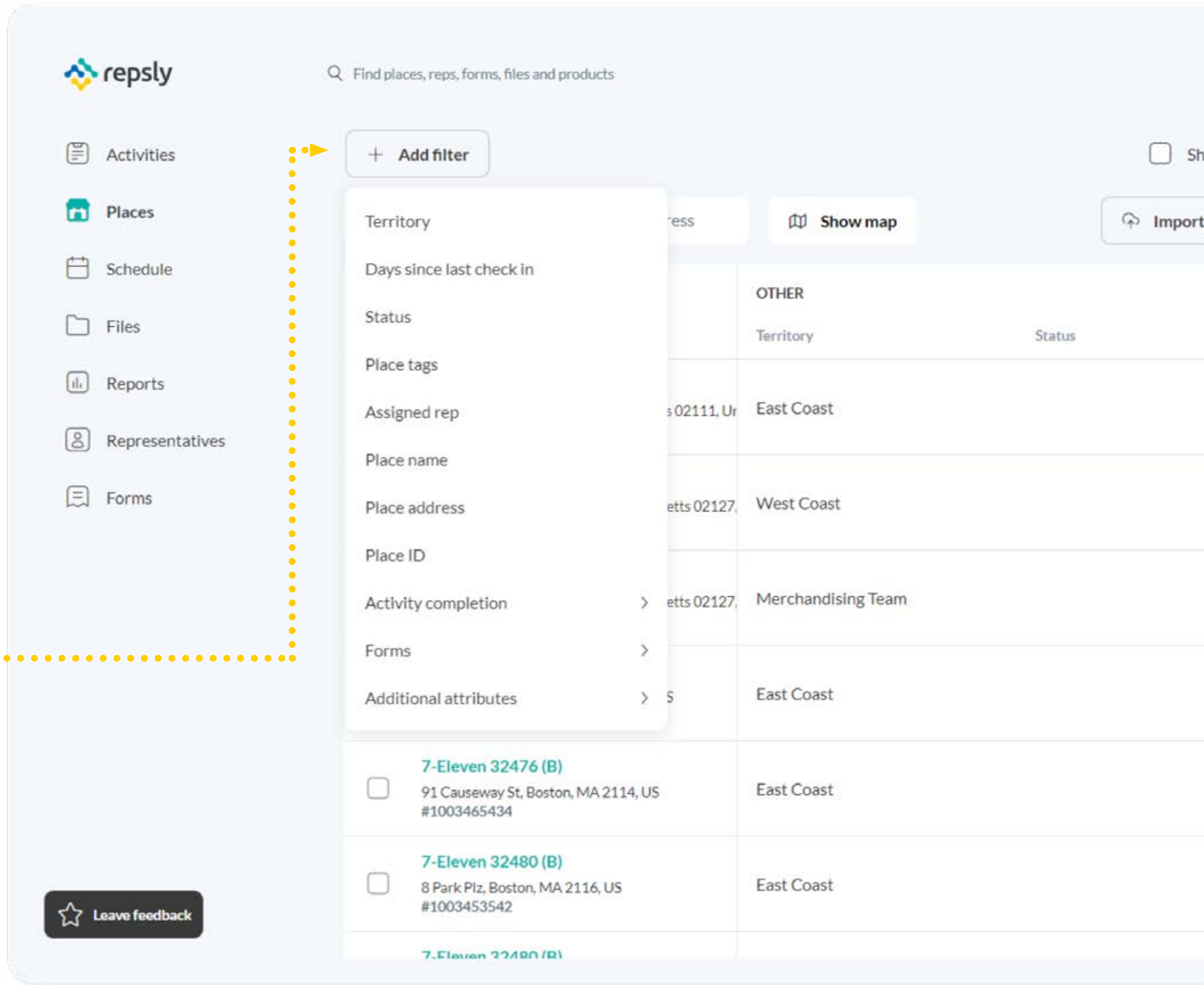
3



HOW TO FILTER PLACES?

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 **Places tab** you will see a drop-down menu with the filters to choose from.

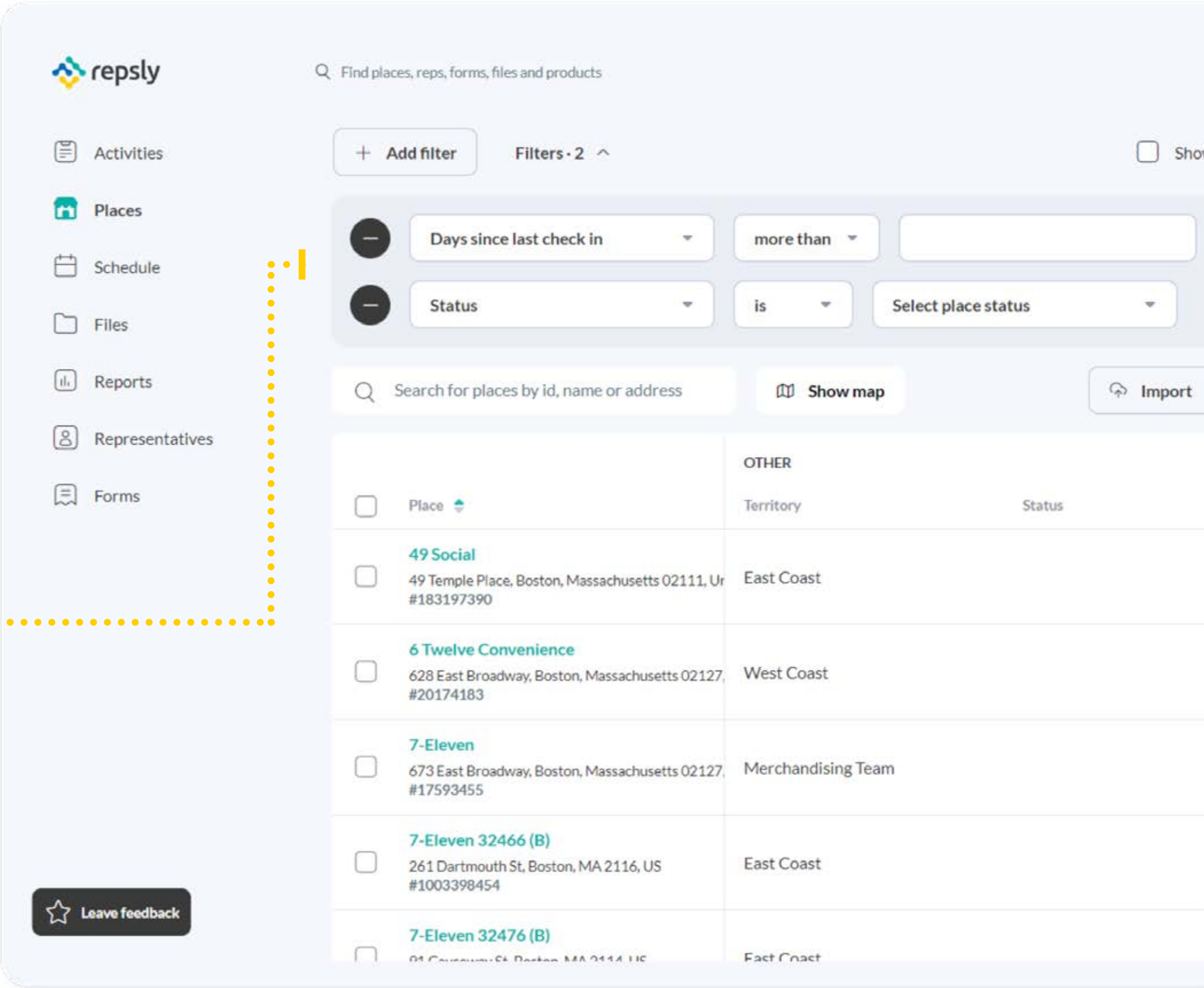


After you select the desired filter you can narrow the search down by choosing additional filters.

2

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

3



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.

4

Once you filtered your places you can export them, schedule a visit or edit them.

5

The screenshot displays the Repsly Backoffice Manager interface. At the top, there's a header with a search bar, a 'Show map' button, and buttons for 'Import', 'Customize columns', and 'New place'. Below the header is a table of places. The table has columns for 'Place', 'Territory', 'Status', and 'Latest activity'. The 'Place' column lists various locations, including '49 Social', '6 Twelve Convenience', '7-Eleven', and '7-Eleven 32466 (B)'. The 'Territory' column lists 'East Coast' and 'West Coast'. The 'Status' column shows 'OTHER' and 'Merchandising Team'. The 'Latest activity' column shows 'Enya Evanovska' and '5/24/21, 4:52 PM'. A yellow circle with the number 4 points to the 'Apply' button on the left. A yellow circle with the number 5 points to the 'Export' button at the bottom right. The bottom of the interface shows a dark bar with '1 place selected', 'Schedule a visit', 'Export', and 'Edit' buttons.

Place	Territory	Status	Latest activity
<input type="checkbox"/> 49 Social 49 Temple Place, Boston, Massachusetts 02111, Ur #183197390	East Coast		
<input type="checkbox"/> 6 Twelve Convenience 628 East Broadway, Boston, Massachusetts 02127, #20174183	West Coast		
<input type="checkbox"/> 7-Eleven 673 East Broadway, Boston, Massachusetts 02127, #17593455	Merchandising Team		
<input type="checkbox"/> 7-Eleven 32466 (B) 261 Dartmouth St, Boston, MA 2116, US #1003398454	East Coast		
<input checked="" type="checkbox"/> 7-Eleven 32476 (B) 91 Causeway St, Boston, MA 2114, US #1003465434	East Coast		Enya Evanovska 5/24/21, 4:52 PM
<input type="checkbox"/> 7-Eleven 32480 (B) 8 Park Plz, Boston, MA 2116, US #1003453542	East Coast		

If you decide to make edits, you'll have a suggestions which elements you want to change.

6

✎ Edit 1 places

Cancel Apply changes

Activity	Territory
Pricelists	USA >
Reps	Merchandising Team
Tags	Northeast >
Territory	North >
Statuses	

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

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.

1

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.

2

The screenshot displays the Replsly Backoffice Manager interface. On the left is a sidebar with navigation icons for Activities, Places, Schedule, Files, Reports, Representatives, and Forms. The main content area shows the profile for a specific place, '7-Eleven 32466 (B)', located at '261 Dartmouth St Boston, 2116, MA, US'. The 'Contact info' tab is selected, showing fields for Name, ID, Status, and Territory. A dropdown menu for 'Representatives' is open, showing a list of assigned and not assigned representatives. The 'Assigned' list includes Enya Evanovska, Even Hartvig, Juan Carlos, and Mark Jacobs, all with checked boxes. The 'Not assigned' list includes Terry Quentin and Zac Bell, both with unchecked boxes. A yellow dotted line connects the 'Representatives' dropdown in the sidebar to the dropdown menu in the main content area. Another yellow dotted line connects the 'Representatives' dropdown in the sidebar to the 'Representatives' section in the main content area. At the bottom left of the sidebar is a 'Leave feedback' button.

HOW TO SEND A MESSAGE?

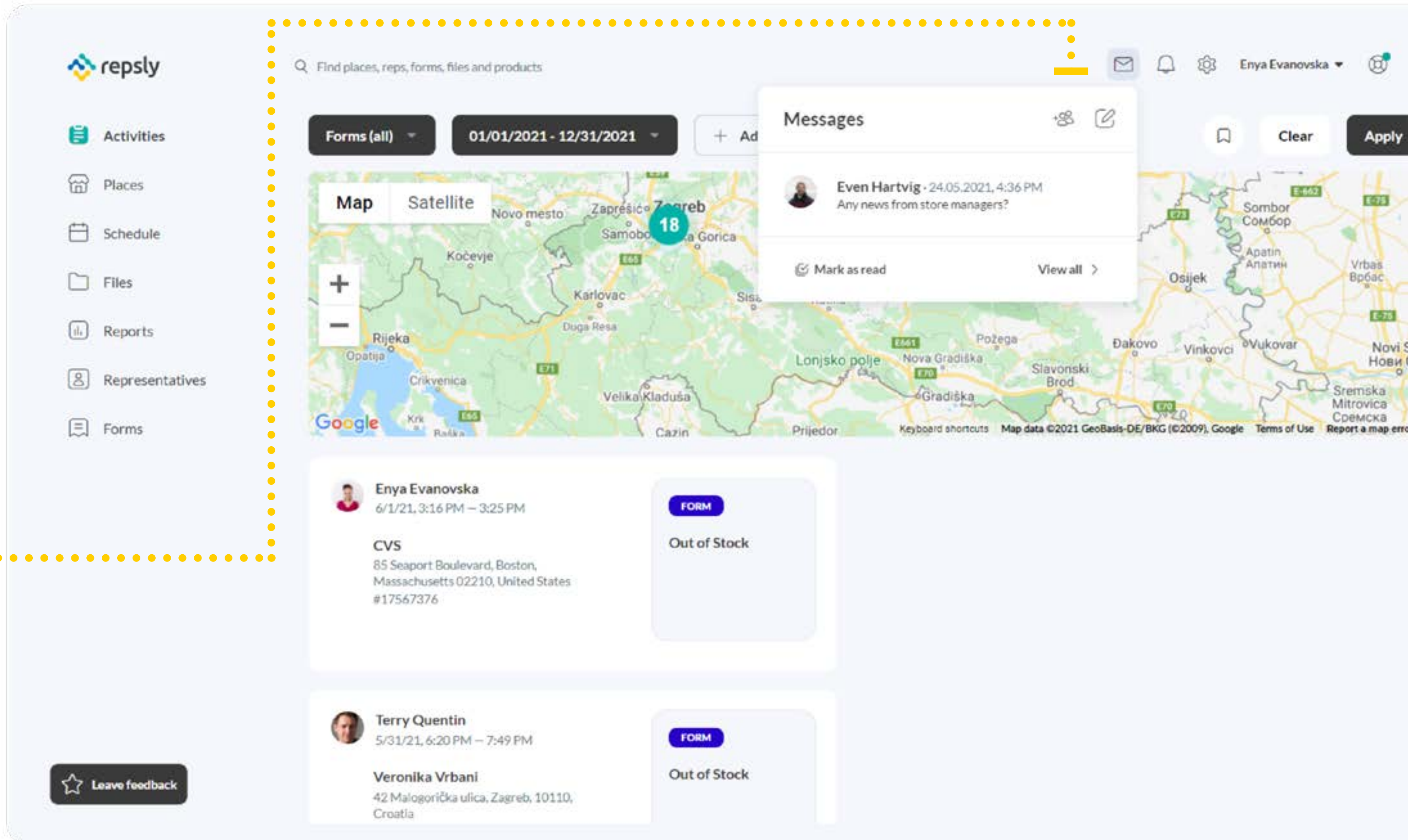
Messaging is our new feature for sharing insights or wins (including photos) in context while reps are doing their work. Managers can easily get information out to their entire team or coach individual teammates 1:1.

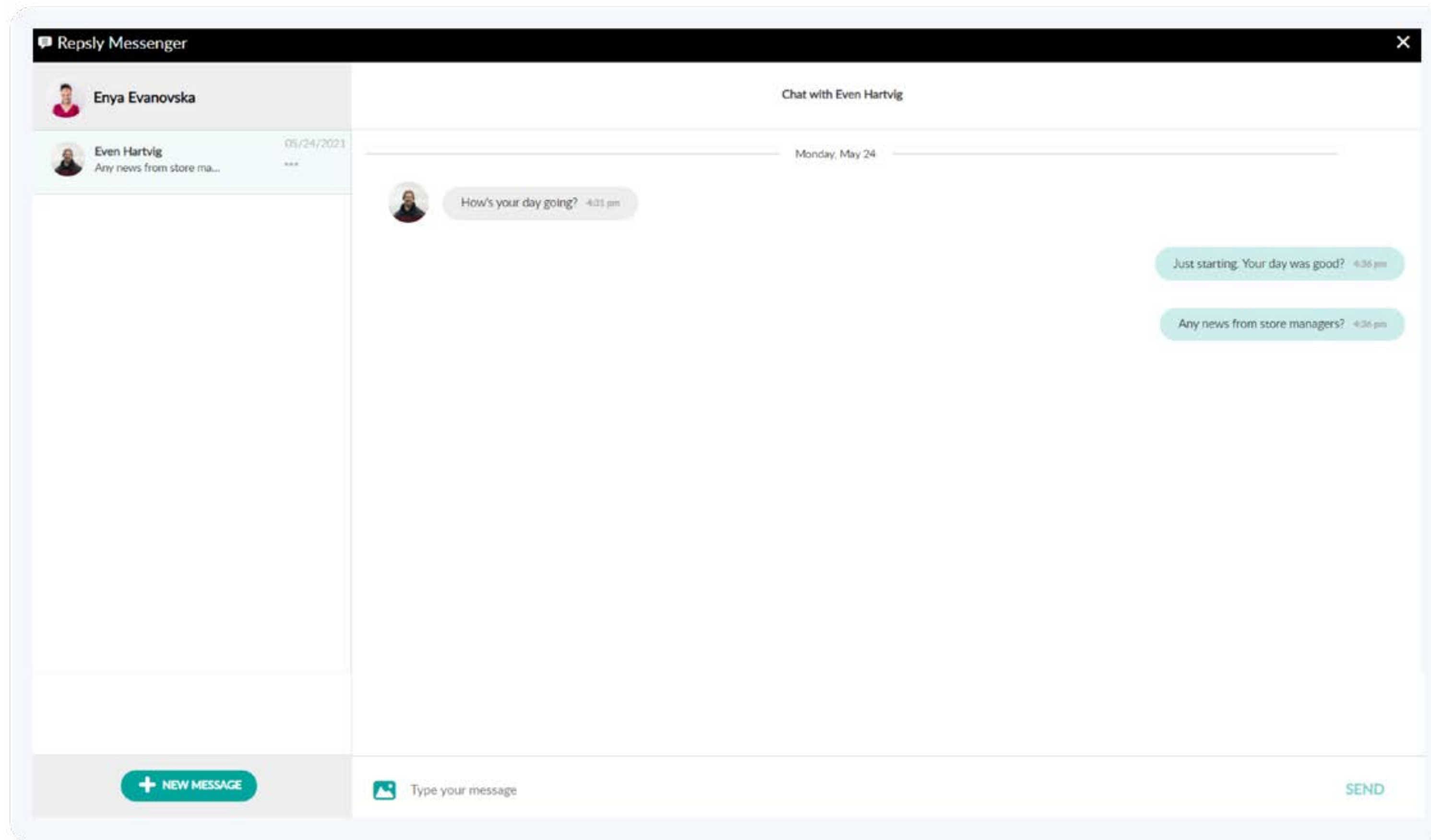
Find the **Messaging** module in your menu.

1

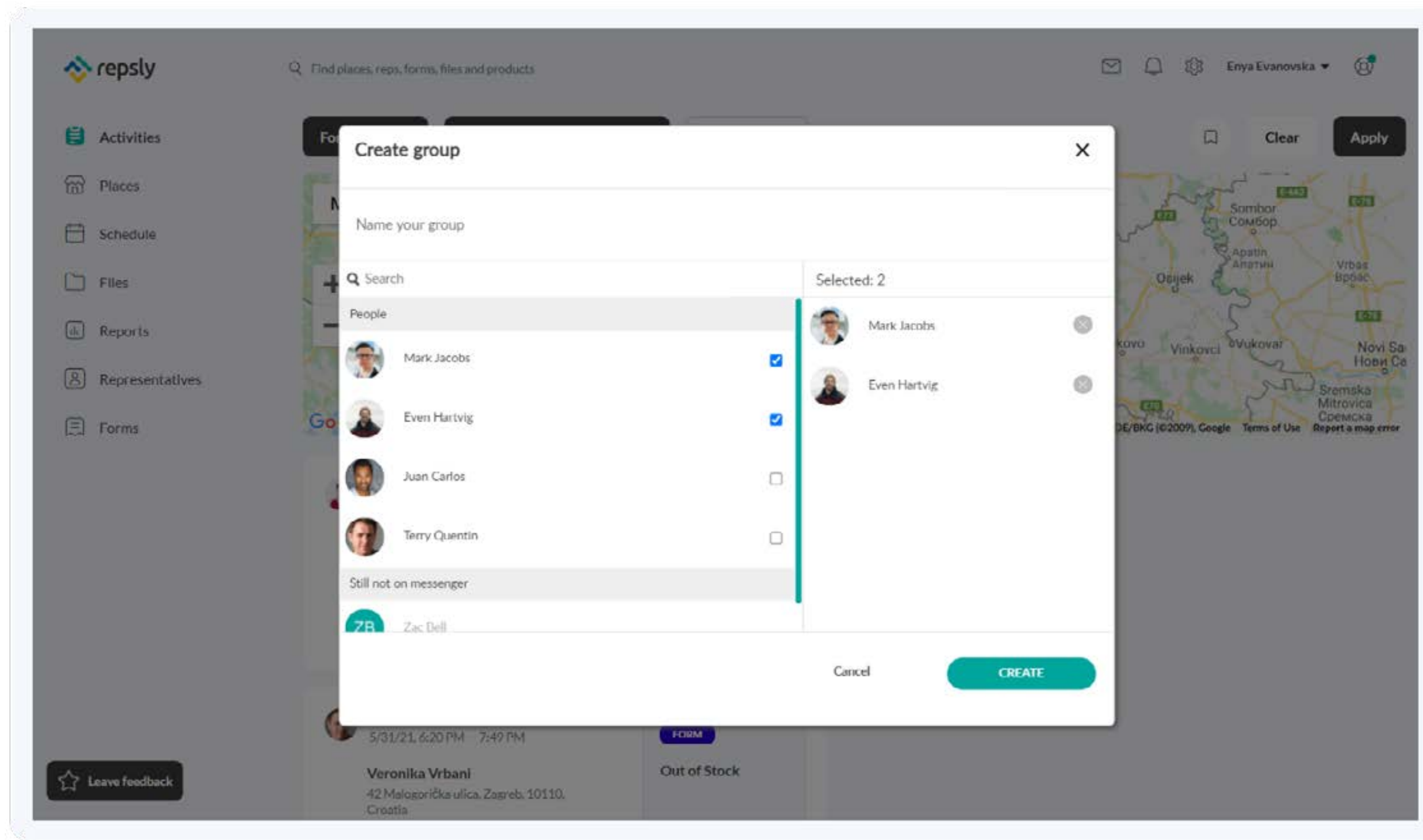
Create a new chat and select teammate(s).

2




3

Type your message or choose the camera.



4

You can create a group chat as well.

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.

Click on **Schedule tab**.

1

Click on **New visit** to schedule a new visit.

2

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

3

repsly

Find place

Activities

Places

Schedule

Files

Reports

Representatives

Forms

NEW VISIT

Place

Start typing Place name

Representatives

Start typing Representative name

Date

7/30/2021

☒ Set as due date

Time

Any time

Duration

☐ Repeat

Description

Tasks

Alerts

ADD TO SCHEDULE

CANCEL

Leave feedback

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.

Click on the **Schedule** tab.

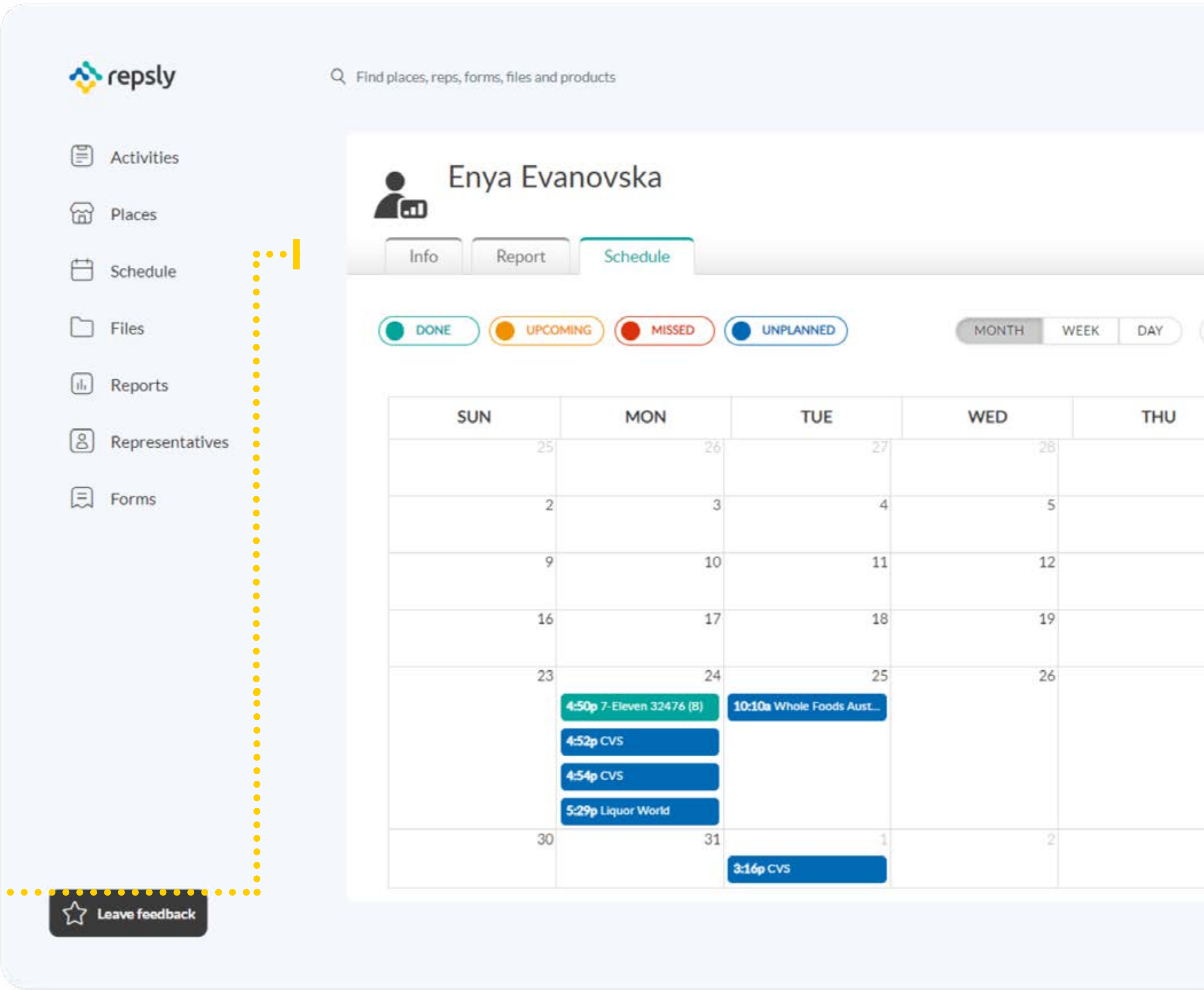
1

Select a **representative**.

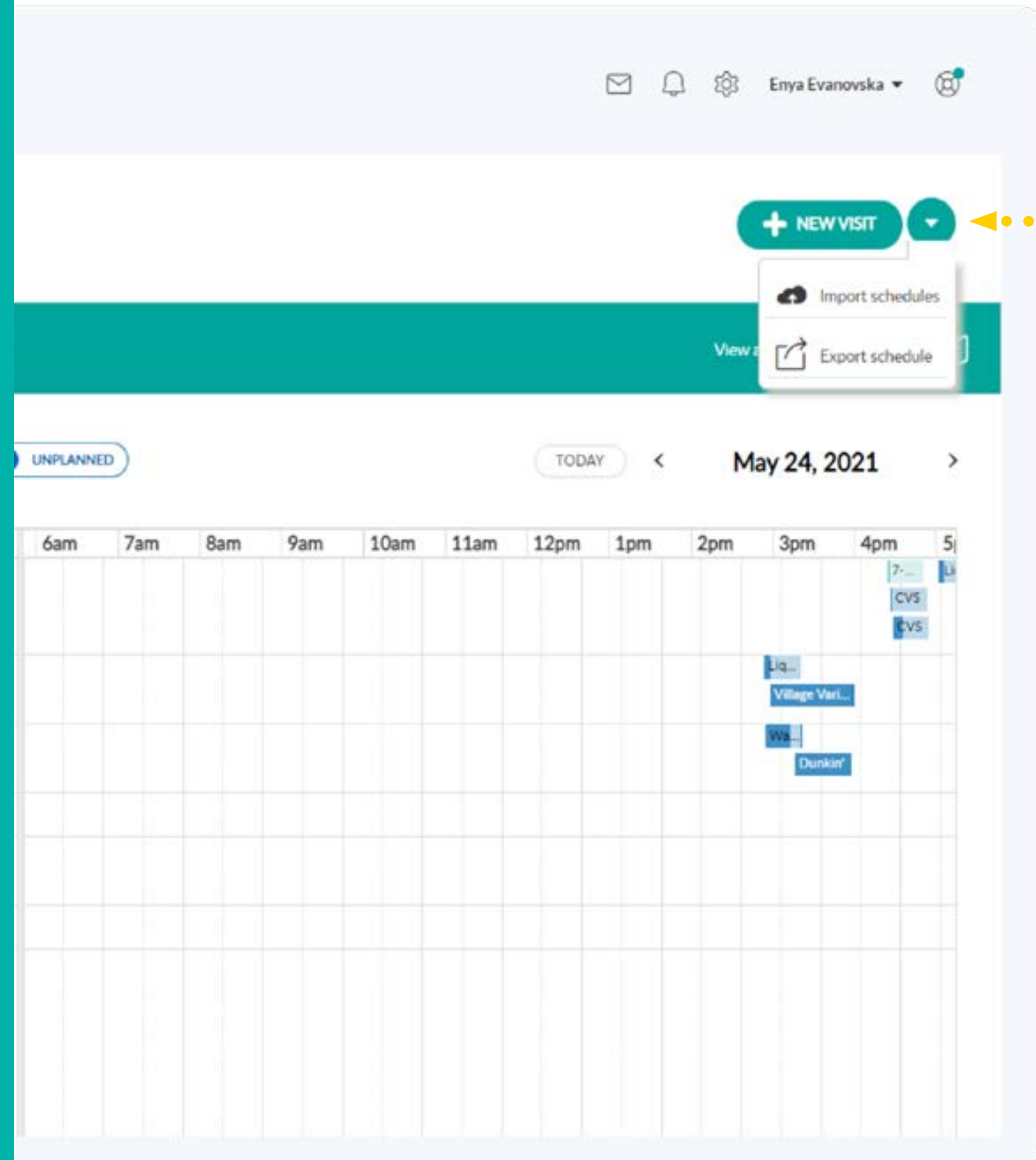
2

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

3



HOW TO IMPORT SCHEDULE?



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

1

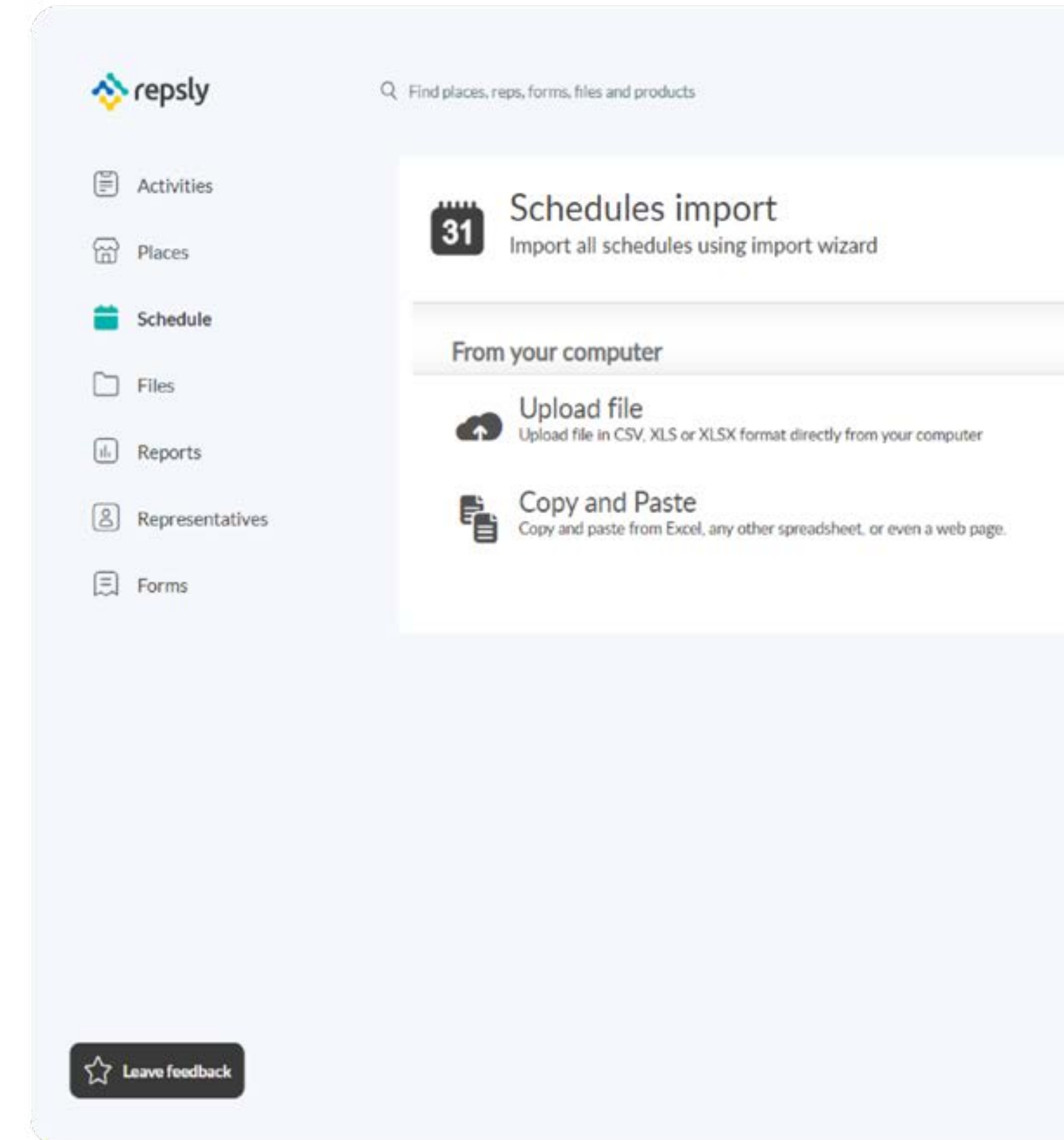
Click on **Schedule** and then click on the inverted triangle next to the new visit button. This will reveal the **Import Schedule tab**.

2

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

3

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



HOW TO SEE PHOTOS?

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**.

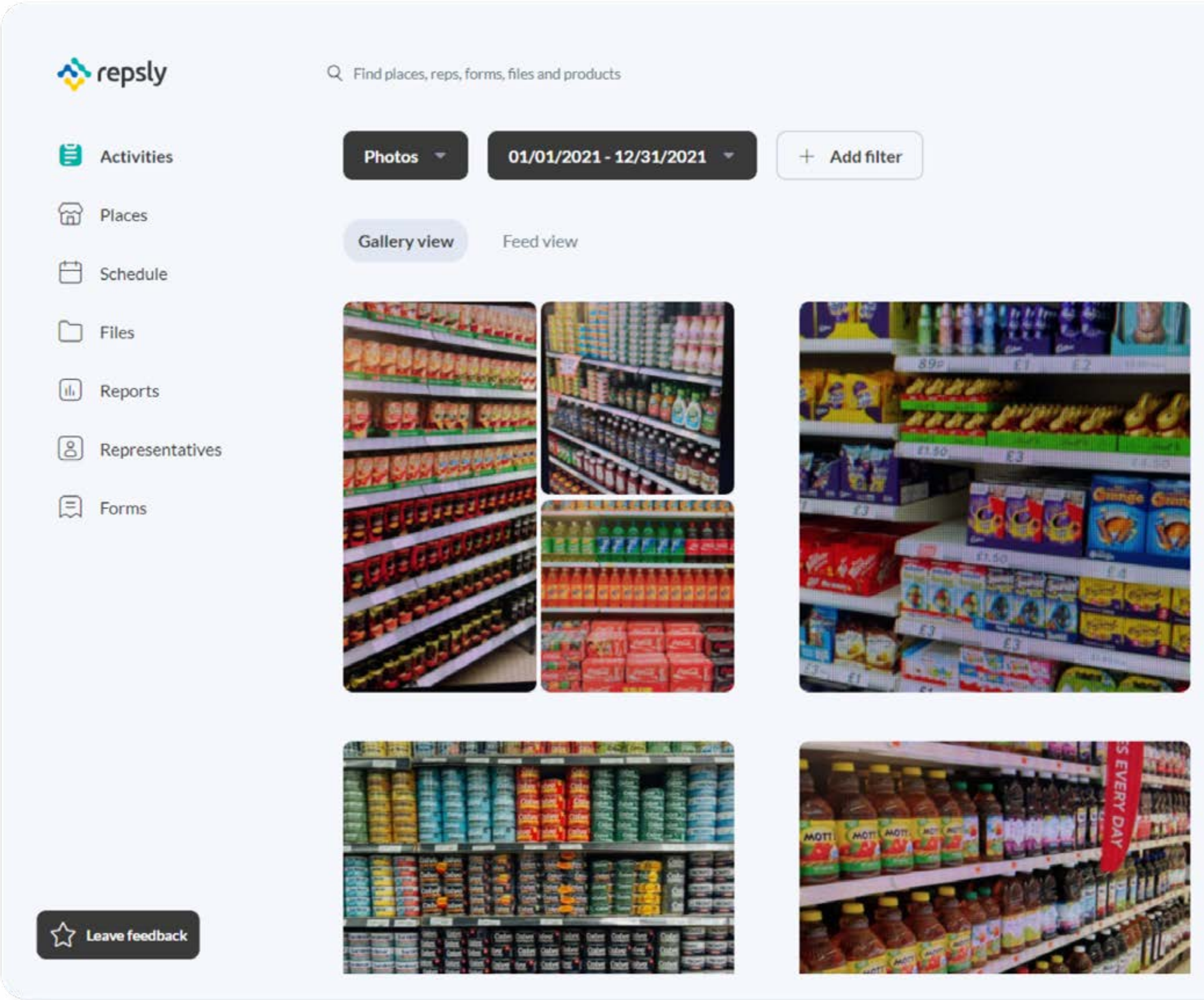
From your activities, select the Photos option, and optionally select your date range. Click **Apply**.

Add more filters to filter by Photo tags if needed .

1

2

3



Find places, reps, forms, files and products

Photos

01/01/2021 - 12/31/2021

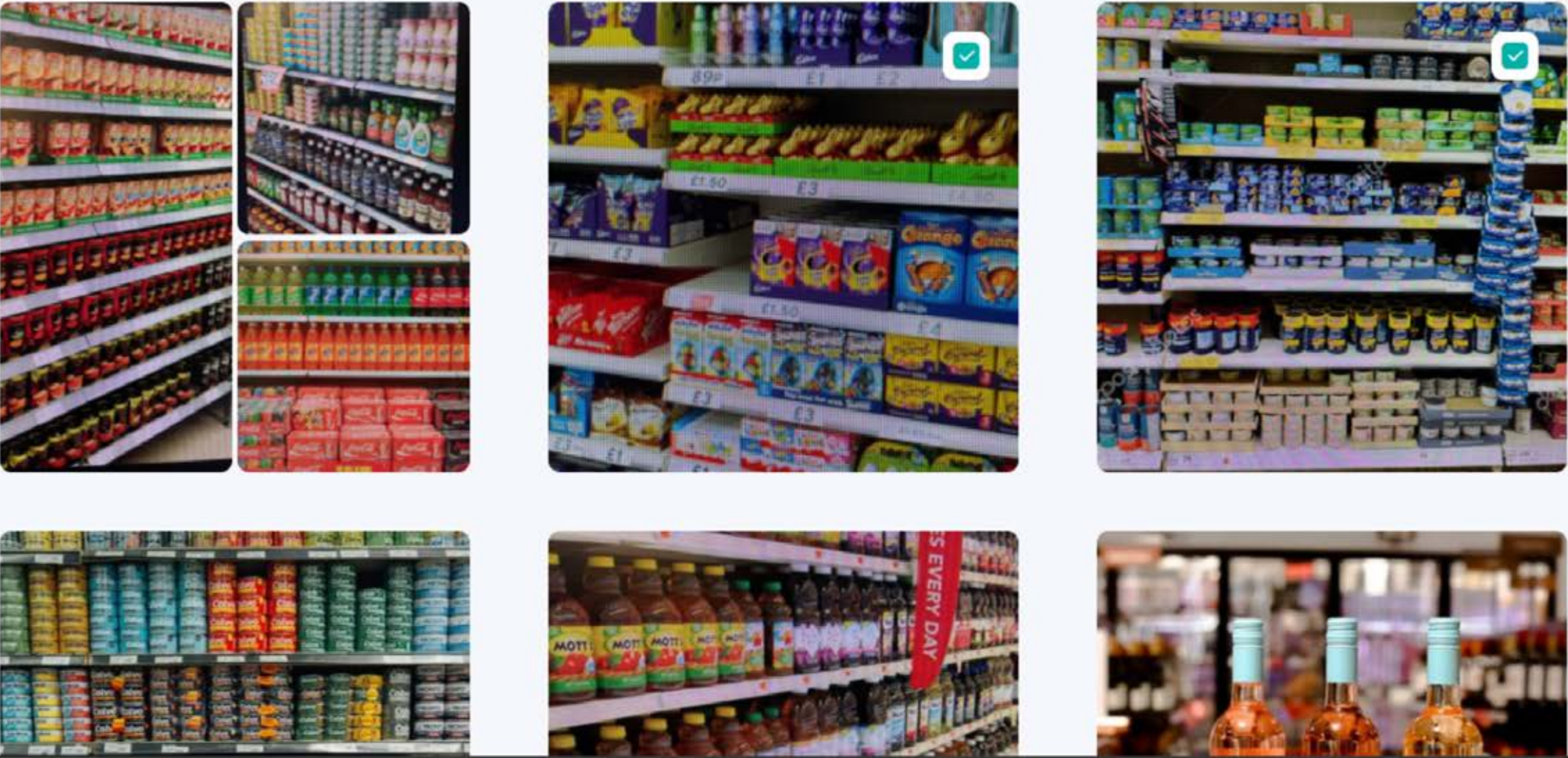
+ Add filter

Enya Evanovska

Gallery view

Feed view

Select all 14 photo



2 photos selected

Download

Edit tags

Share

Delete

4 Select All photos or choose individual Photos to download.

HOW TO EXPORT NOTES?

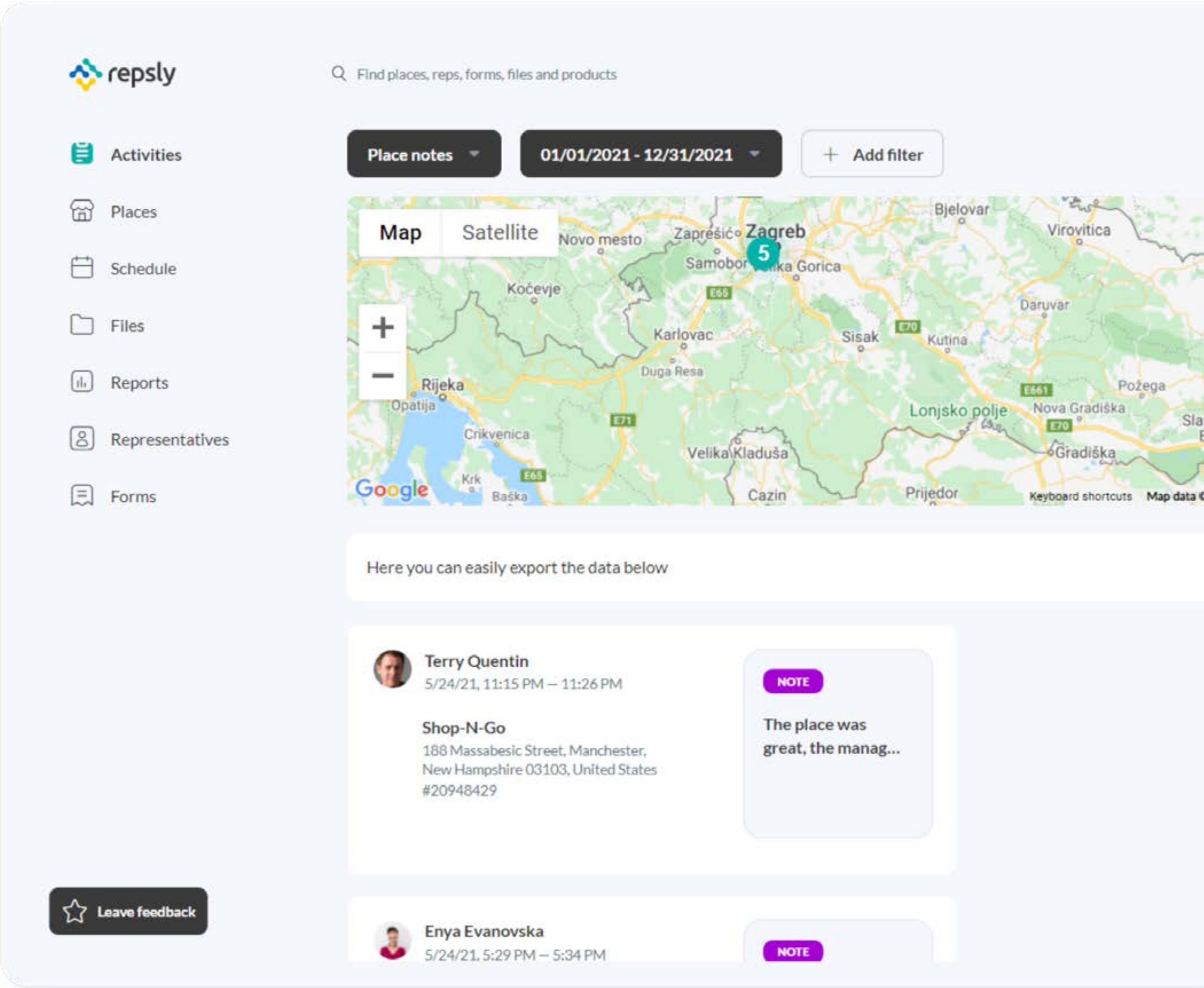
Exporting data from Repsly allow your Management to further analyze information gathered by field representatives.

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

1

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

2



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.

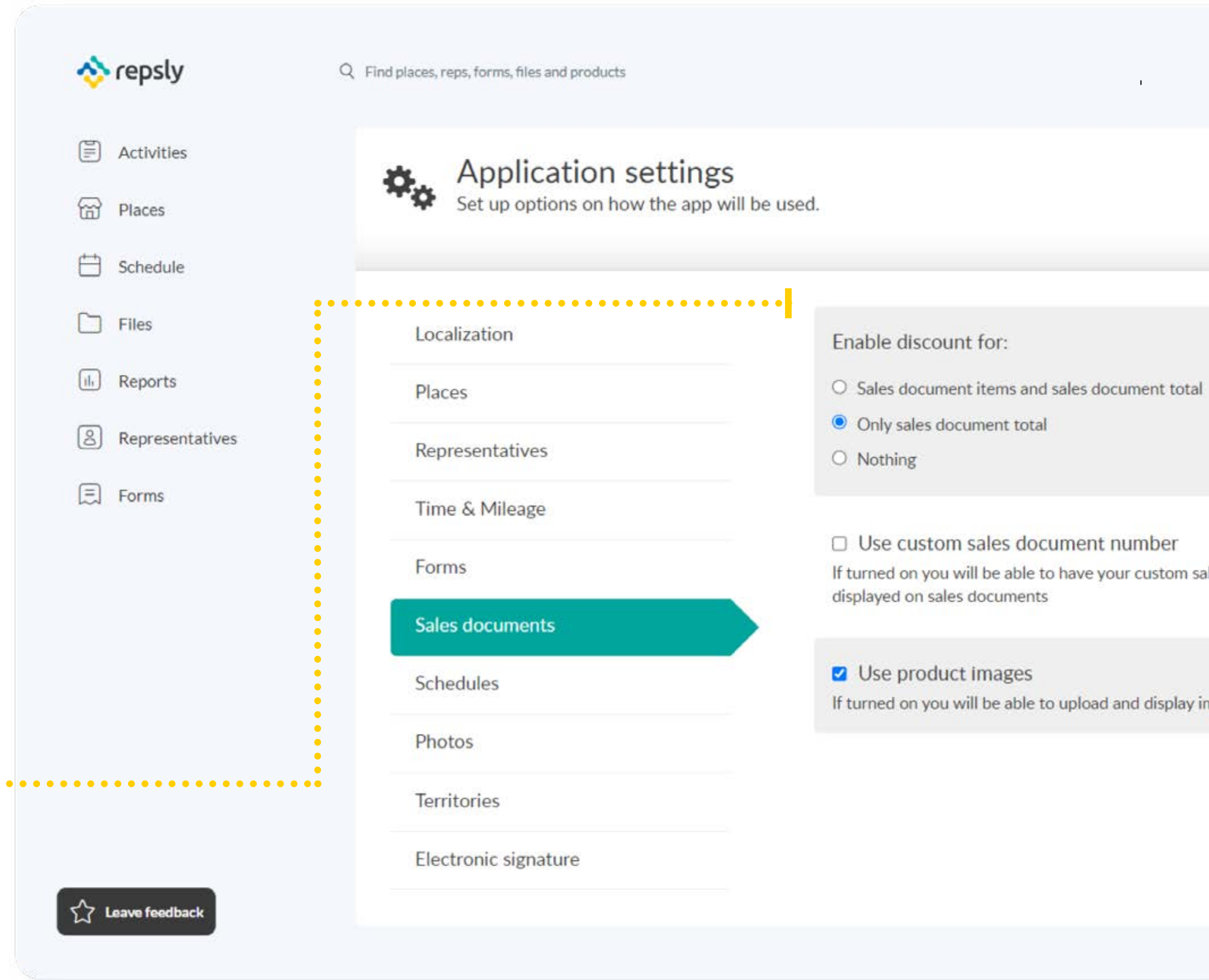
Click on the **Gear Icon** and then click on **Application settings**.

1

Click on the **Sales documents**. Here you will see 3 options for discounts : Order items and order total, Only order total or Nothing.

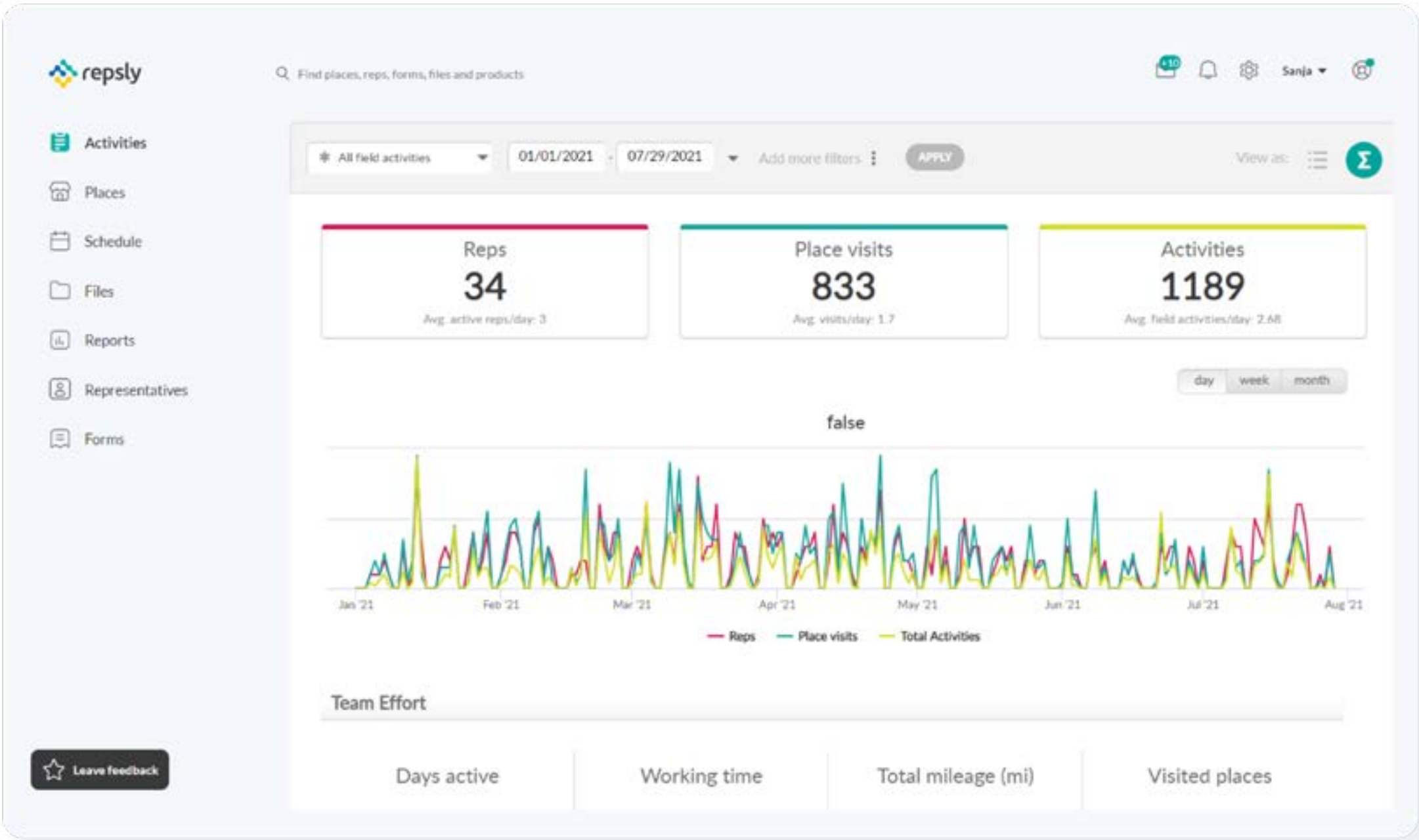
2

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



HOW TO VIEW REPORT?

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



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

The screenshot shows the Repsly Rankings Report table. At the top, there's a search bar and a navigation menu with options like Places, Reports, and Forms. The main content area features a table with columns: PLACE, VISITS, FORMS, PHOTOS, NOTES, SALES DOCUMENTS, and RETAI. The table lists various places and their corresponding activity counts. A 'NEW PLACE' button is visible in the top right corner.

PLACE	VISITS	FORMS	PHOTOS	NOTES	SALES DOCUMENTS	RETAI
49 Social	19	8	1	3	2	
6 Twelve Convenience	50	18	5	9	6	
7-Eleven	46	30	11	8	9	
7-Eleven 32466 (B)	3	0	0	0	0	
7-Eleven 32476 (B)	1	1	0	0	0	
7-Eleven 32480 (B)	5	3	0	0	0	
7-Eleven 33519 (B)	2	2	0	0	1	
ACME Markets	8	4	1	0	0	
Caffè Nero	2	1	1	1	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.

01/01/2021 - 07/29/2021

Add more filters

APPLY

EMAIL REPORT

EXPORT

Order

Sales by Product

Analyze your sales results by Products

SNAPSHOT TREND BY

	PRODUCT ID	NAME	PRICE	SALES QUANTITY	SALES TOTAL
	25	Canon EOS 5D Mark IV Camera	\$ 3099	27	\$ 83673
	23	Greenworks, 80V 18-Inch Cordless Brush ...	\$ 299	30	\$ 8970
	14	Beyond Meat, Beyond Burger	\$ 5.99	1188	\$ 7116.12
	2	Opulent Gin	\$ 29.99	228	\$ 6837.72
	1	Vita Coco, Organic Coconut Water	\$ 2.99	1092	\$ 3265.08
	11	KIND Bars, Peanut Butter Dark Chocolate	\$ 19	156	\$ 2964
	12	Hint Water, Watermelon	\$ 1.39	2076	\$ 2885.64
	10	Kraft, Original Macaroni & Cheese Dinner	\$ 20	135	\$ 2700
	15	Beautyblender, Original Blender Sponge	\$ 25	102	\$ 2550

Sales Report: this is a sales report by each product

01/01/2021 - 07/30/2021

Add more filters

APPLY

EMAIL REPORT

EXPORT

Coverage Report

Analyze how well your team is covering the territory

	Total places	Places visited	Coverage (%)	Time traveling	Time at place	Link to coverage lists
Megan Hydorn	2	1	50 %	19d 4h 1m	4m	Places visited Places not visited
Michael Currin	-	0	-	2d 1h 8m	-	Places visited Places not visited
Patrick Mahoney	8	6	75 %	22d 4h 38m	1d 4m	Places visited Places not visited

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

Time & Mileage tra

01/01/2021 - 07/29/2021

Add more filters

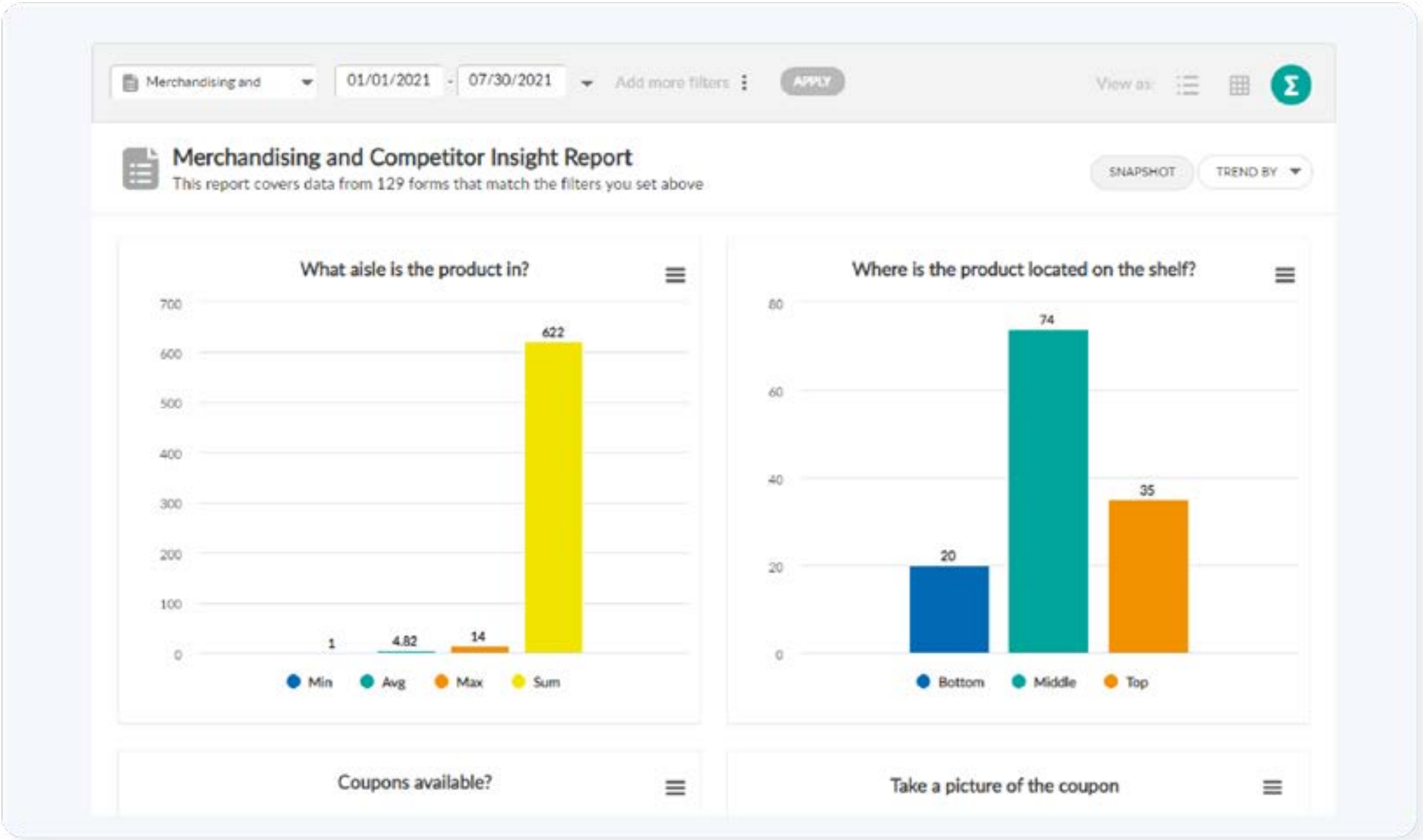
APPLY

View as

Working Time

	REPRESENTATIVE	DATE	WORKDAY START	WORKDAY END	MILEAGE START (MI)	MILEAGE END (MI)	FIRST VISIT	LAST VISIT	MILEAGE TOTAL (MI)	TIME I
	Ben Wright	7/28/2021	3:25 PM	3:58 PM	0	0.09	3:30 PM	3:36 PM	0.09	0:26
	Patrick Mahoney	7/28/2021	10:15 AM		0	0	10:16 AM	2:44 PM	0	0:00
	Edwin	7/27/2021	10:27 AM	10:34 AM	0	0	10:28 AM	10:28 AM	0	0:07
	Matt D	7/26/2021	2:37 PM		0	0			0	0:00
	Edwin	7/26/2021	1:26 PM		0	0	1:28 PM	1:29 PM	0	0:00
	Patrick Mahoney	7/23/2021	5:21 PM		0	0	5:33 PM	8:56 PM	0	0:00
	Megan Hydorn	7/23/2021	3:22 PM		0	0	3:28 PM	3:42 PM	0	0:00
	Edwin	7/23/2021	3:06 PM	3:12 PM	0	0	3:09 PM	3:10 PM	0	0:05
	Tanner Datz	7/22/2021	2:22 PM	2:33 PM	0	0.5	2:24 PM	2:27 PM	0.5	0:09

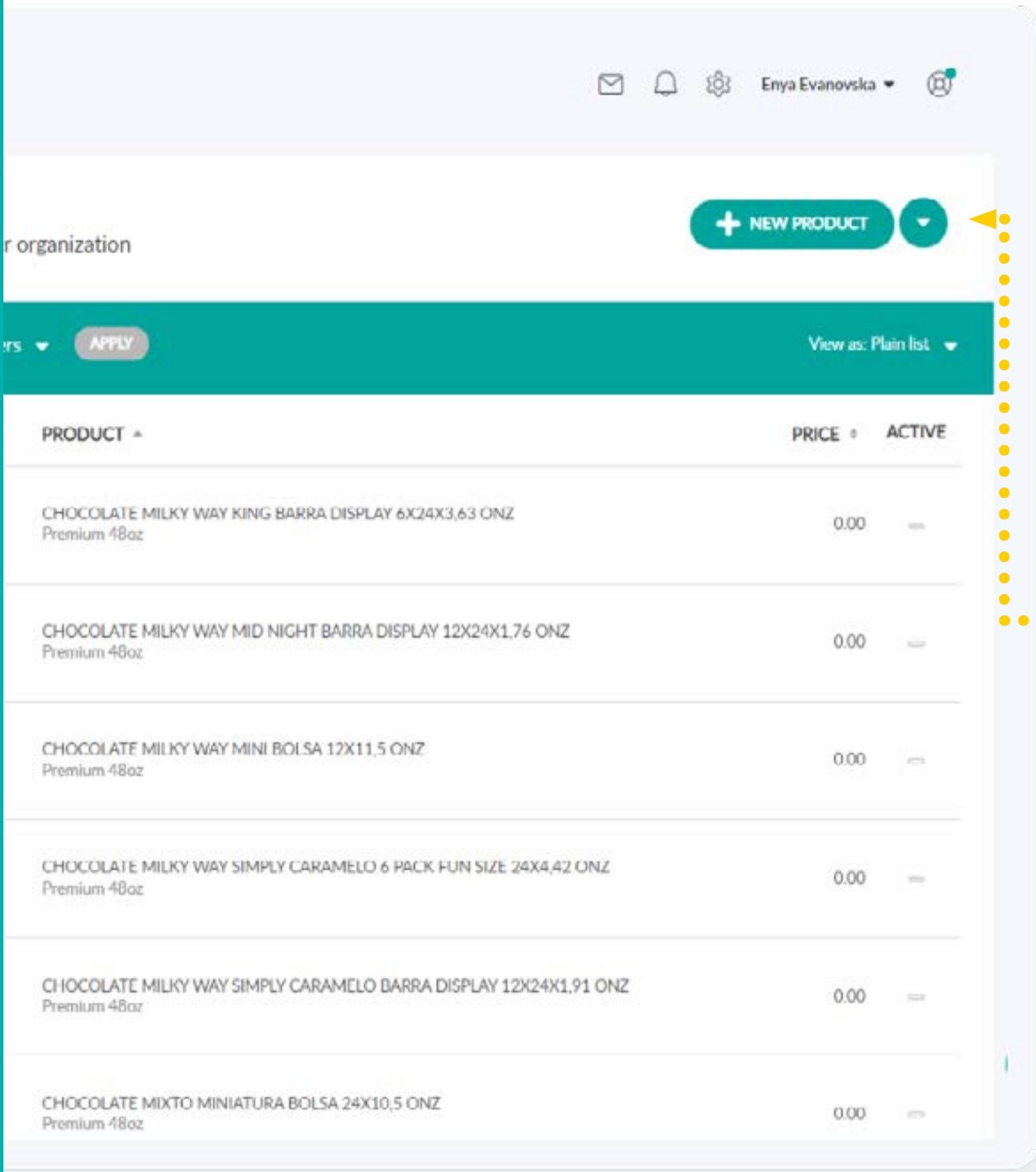
Time and tracking: this report will show you your Reps time and mileage



Form reports: different question types will provide reports

HOW TO ENTER PRODUCTS IN ACCOUNT?

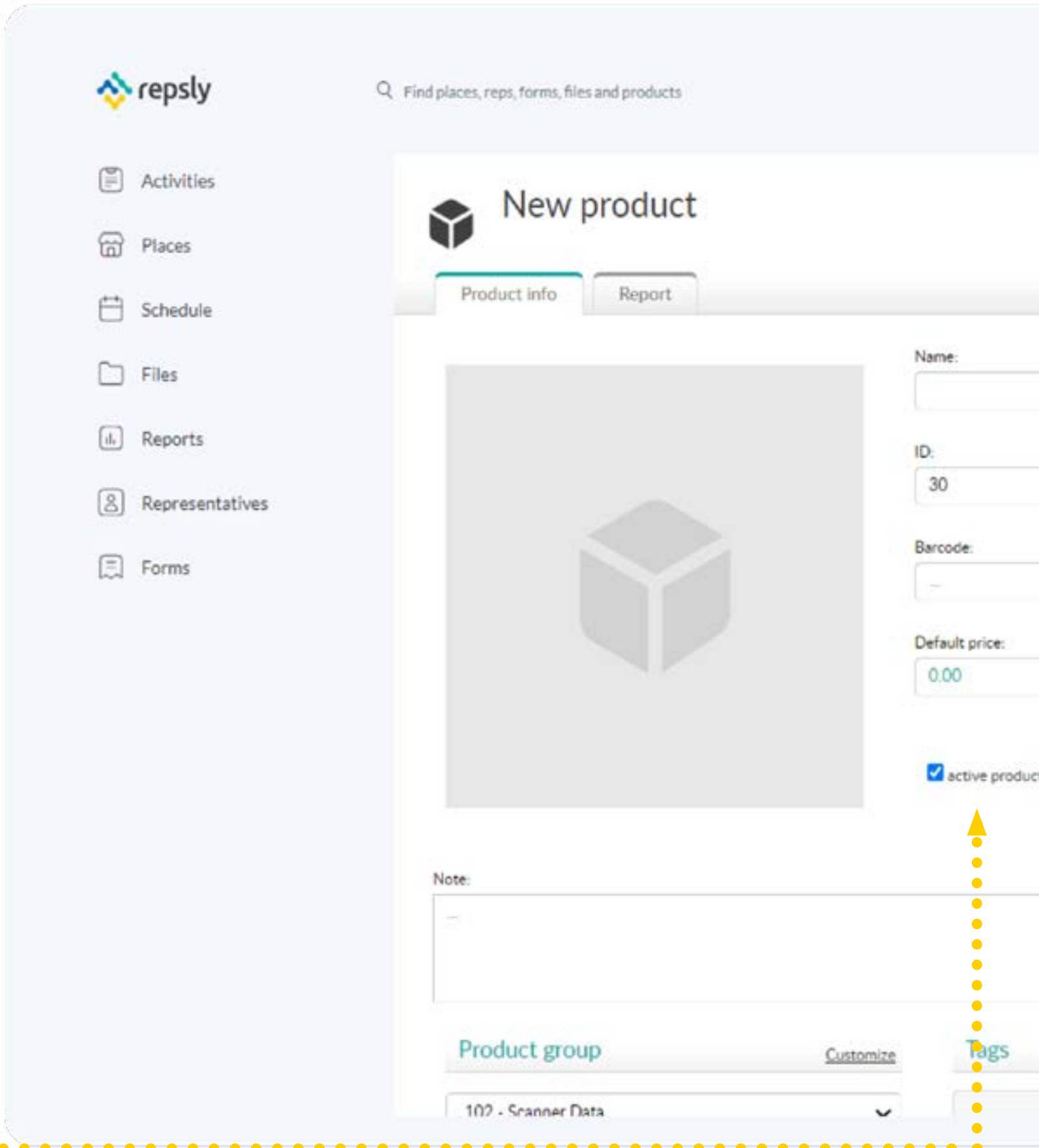
Using products in Replsly allows your reps to fill out purchase orders easier and faster, while reducing the amount of errors. Your reps will be able to use the product monitoring features in Replsly to monitor prices, out of stock, product availability and much more.



1 Click on the **Gear Icon**. Select **Products** and then click the **New Product button**.

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

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



HOW TO USE RETAIL AUDITS?

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

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

1

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

2

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

3

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

4

repsly

Find places, reps, forms, files and products

Activities

Places

Schedule

Files

Reports

Representatives

Forms

New retail audit

Name: ☒ active retail audit ☒ Auto-fill on open

Description:

Built-in fields

☐ Product availability ☐ Product promoted ☐ Product price

☒ Product stock level ☒ Note

Set retail audit accessibility

Connected to places with any of these tags:

All places Start typing a place tag

Visible to these reps:

All reps Start typing rep's name

HOW TO EXPORT PLACE NOTES?

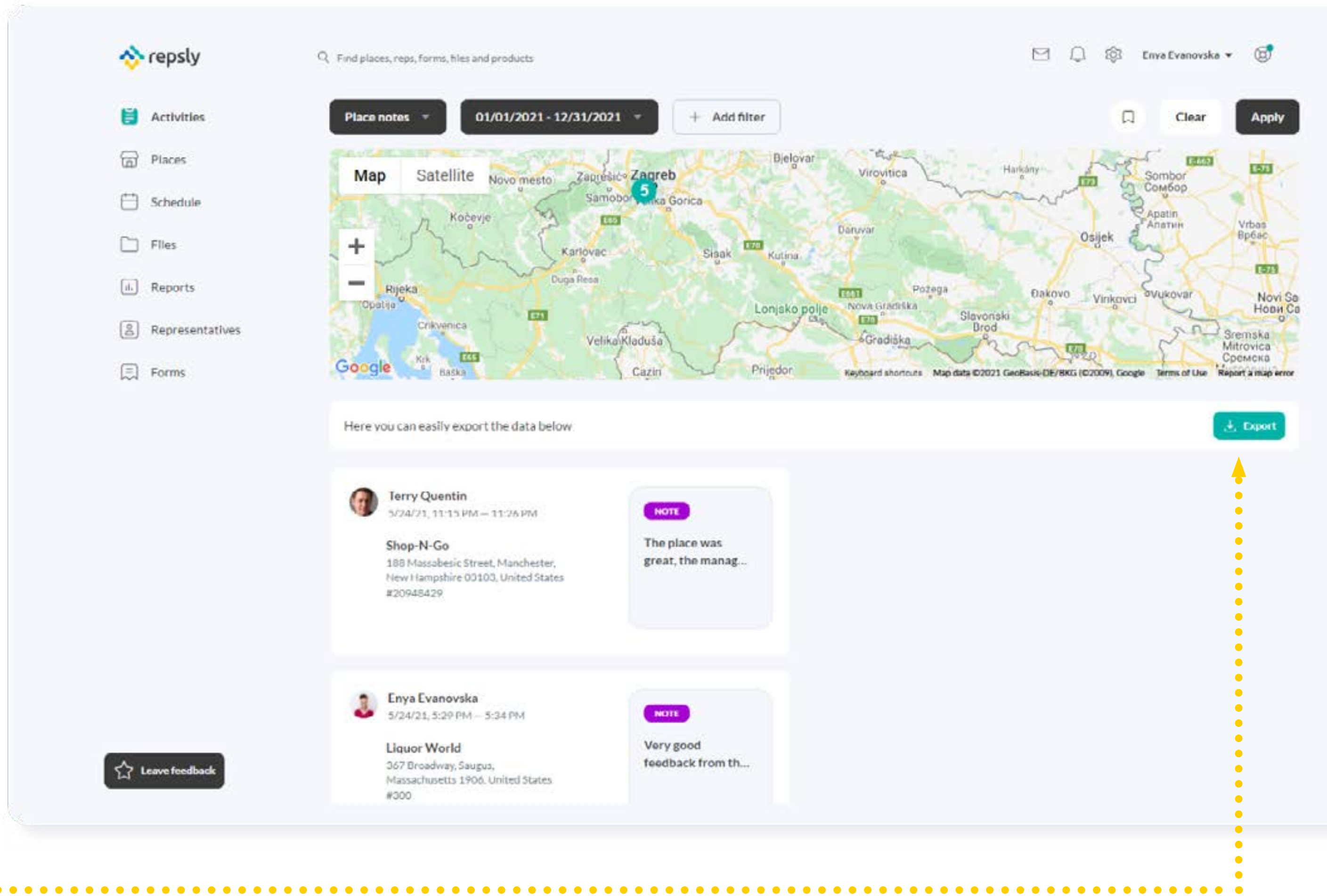
Exporting data from Repsly allow your Management to further analyze information gathered by field representatives.

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

Click on the **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.

1

2



HOW TO DELETE AN ACTIVITY?

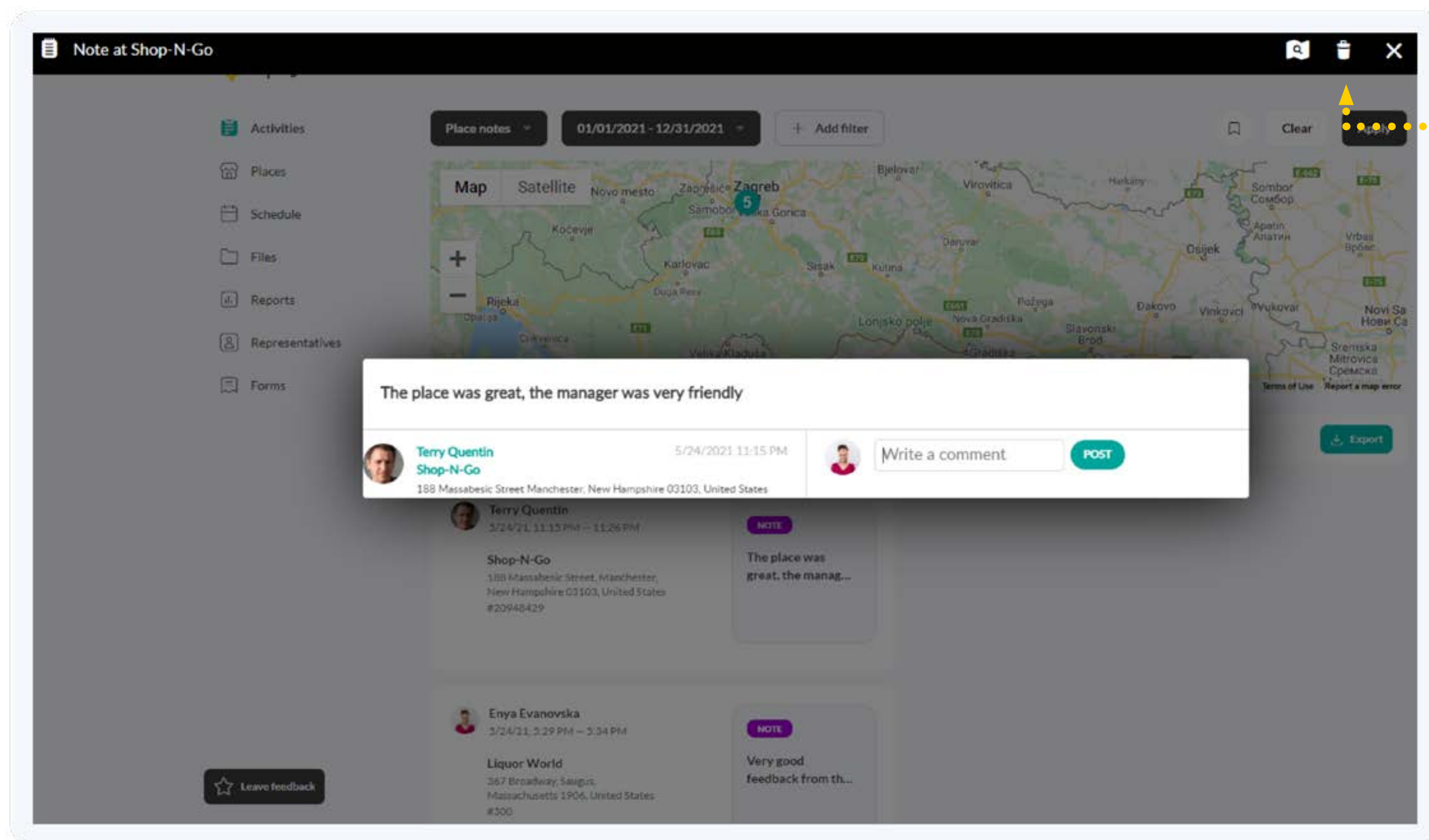
If you want to remove specific information from your submitted activities, you can do it manually from the Repsly web app as a Backoffice user with the appropriate permissions.

1

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

2

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



HOW TO COMMENT ON AN ACTIVITY?

Replsly 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.

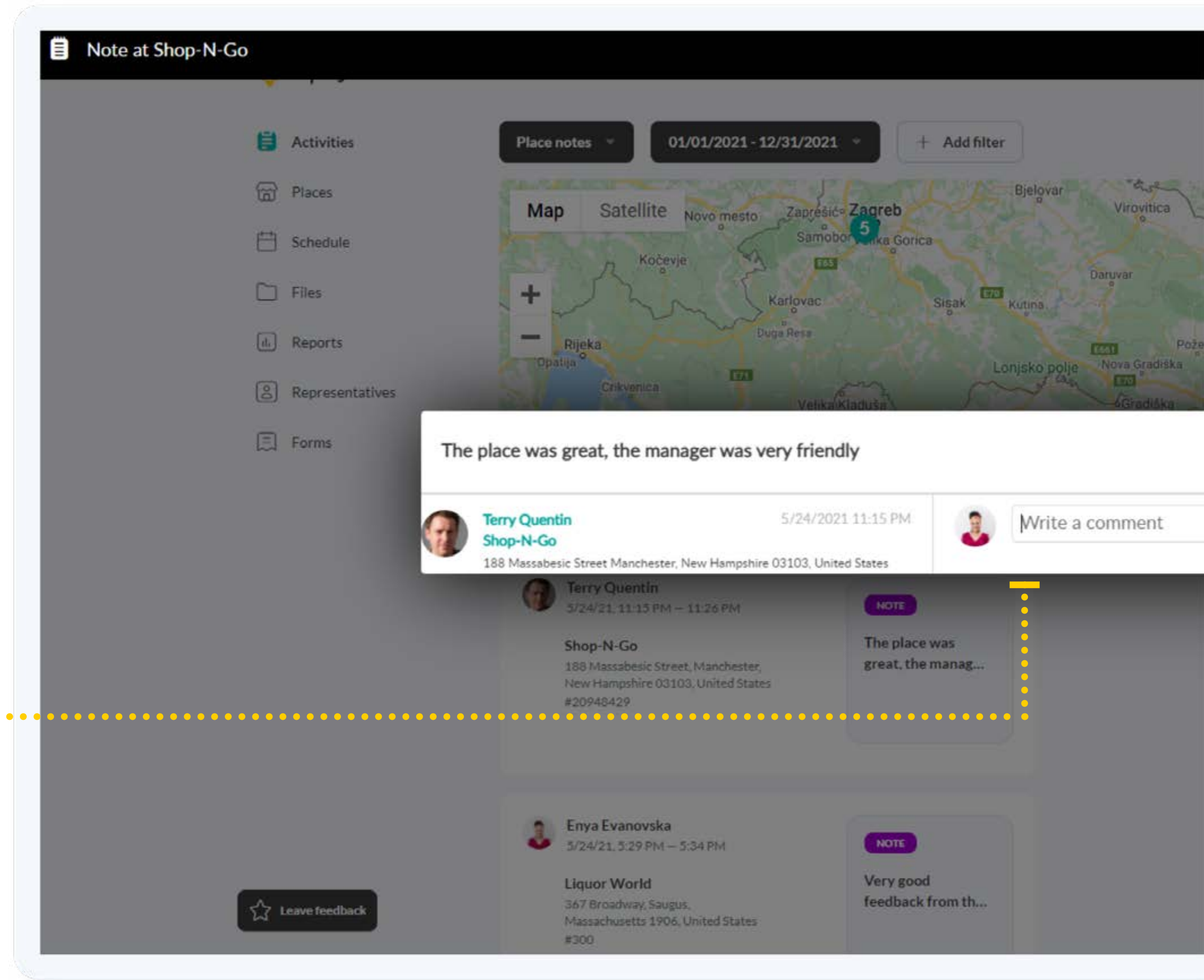
1

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

2

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

3



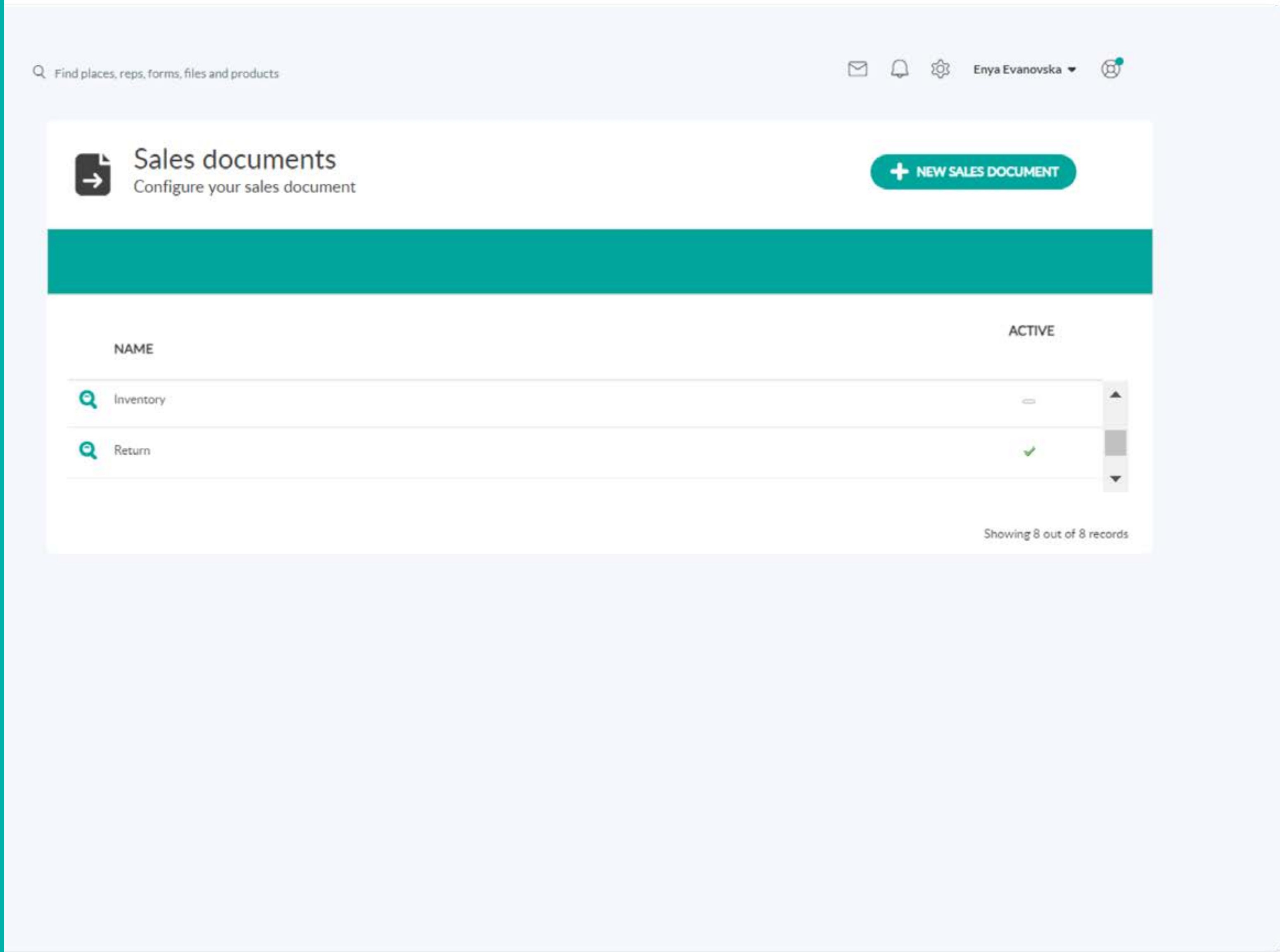
HOW TO CREATE YOUR SALES DOCUMENTS?

1

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

2

Click on the **New Sales Document** button.



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

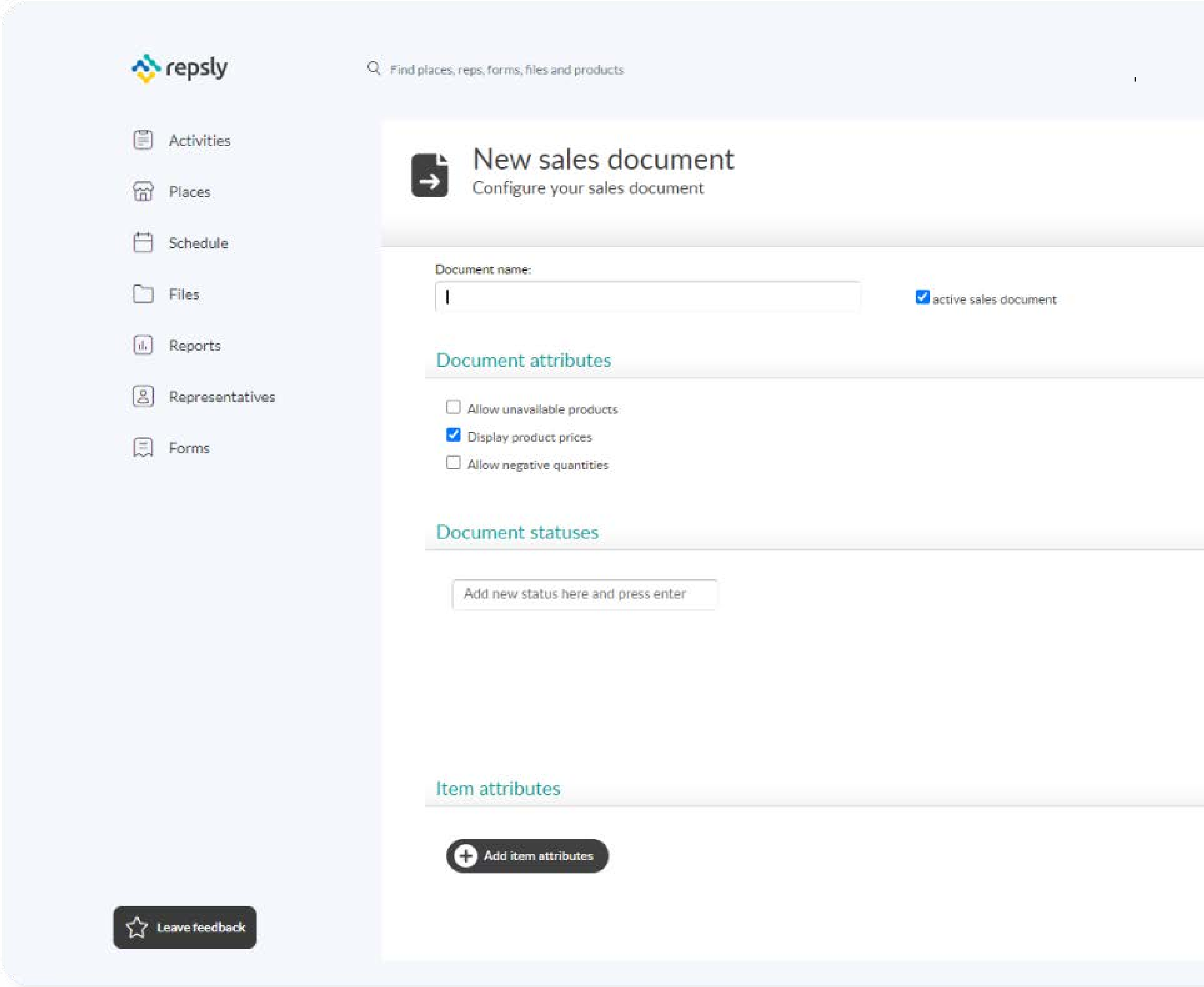
Document statuses are used to track different status for an order. For example, you may want to track if an order was processed, received and shipped.

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.

3

4



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 **Sales documets**.

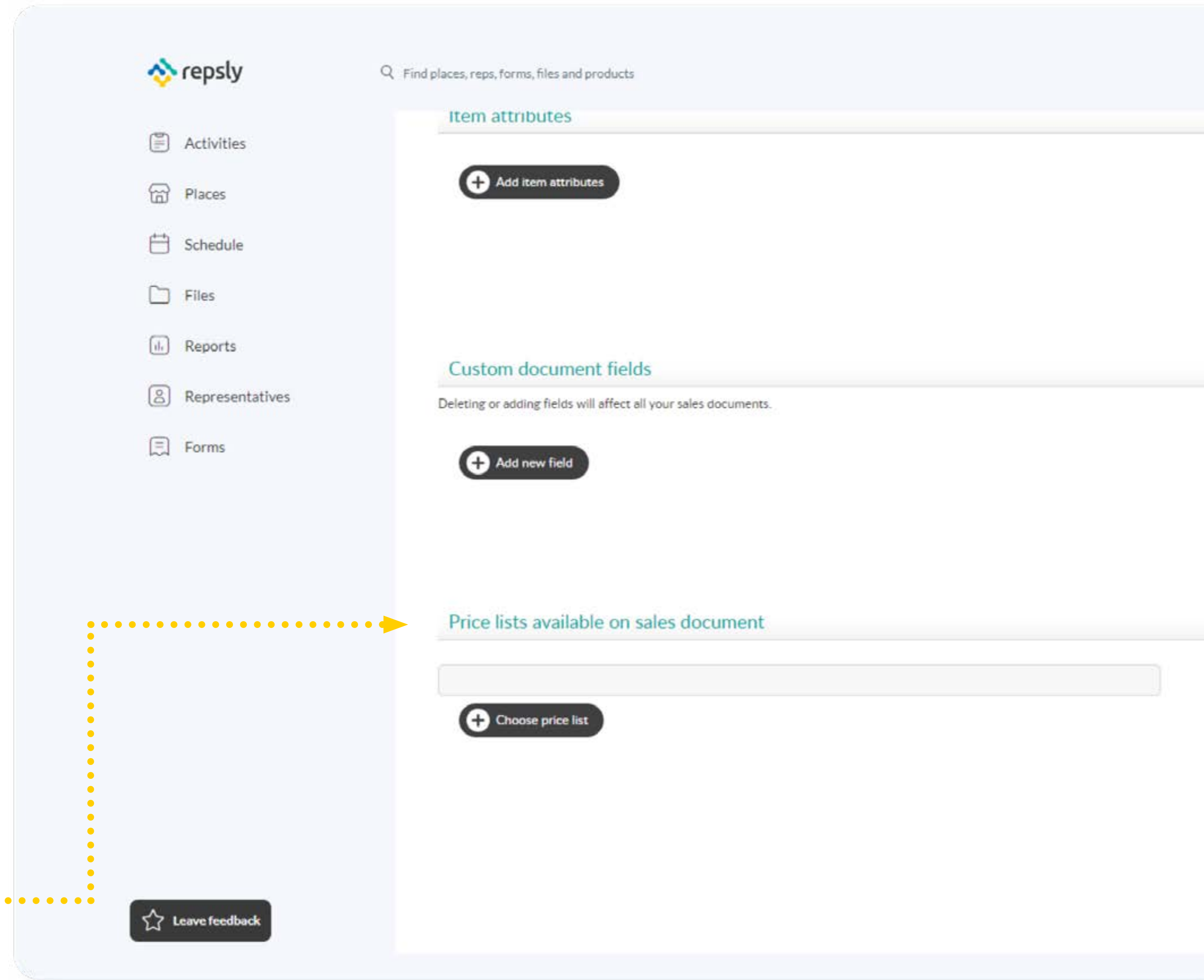
1

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

2

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.

3

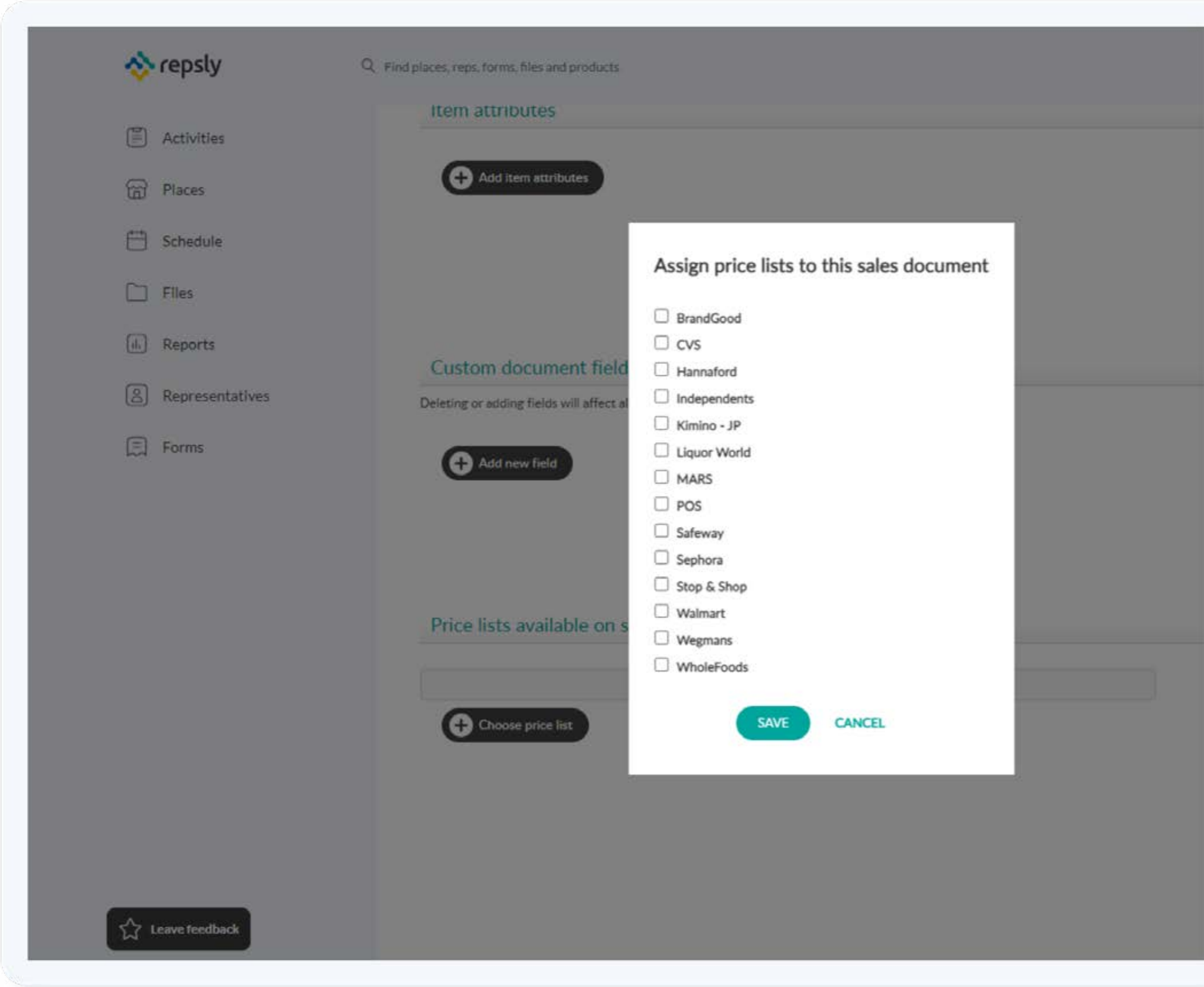


Once you click on Choose Price lists you can select the **Price Lists** you need for that document. When you click on **Save** you will see that your document has been tagged with the chosen price-lists.

4

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

5



HOW TO ENABLE DISCOUNTS FOR ORDERS?

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

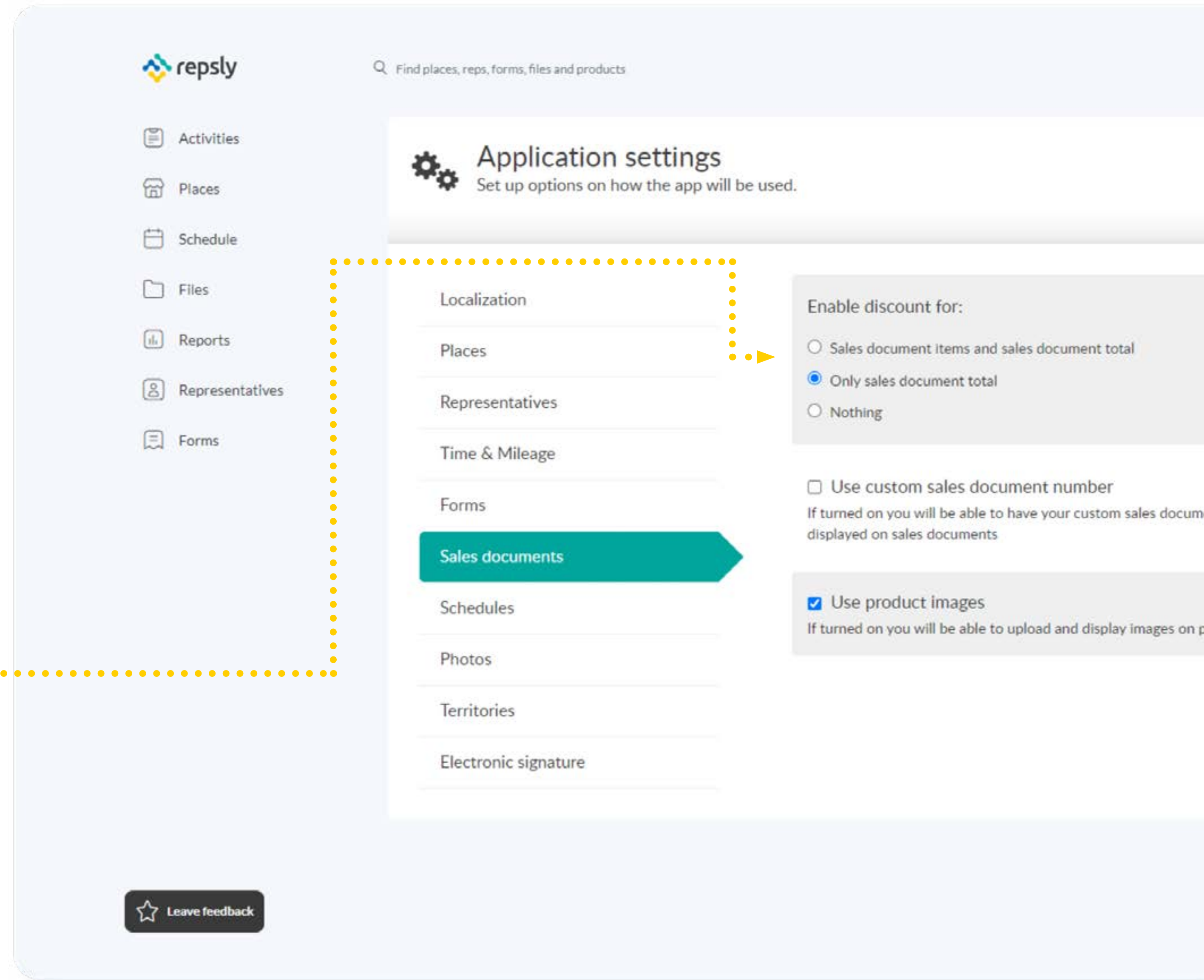
1

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**.

2



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.

1

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

2

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

3

