

Training guide

MOBILE APP



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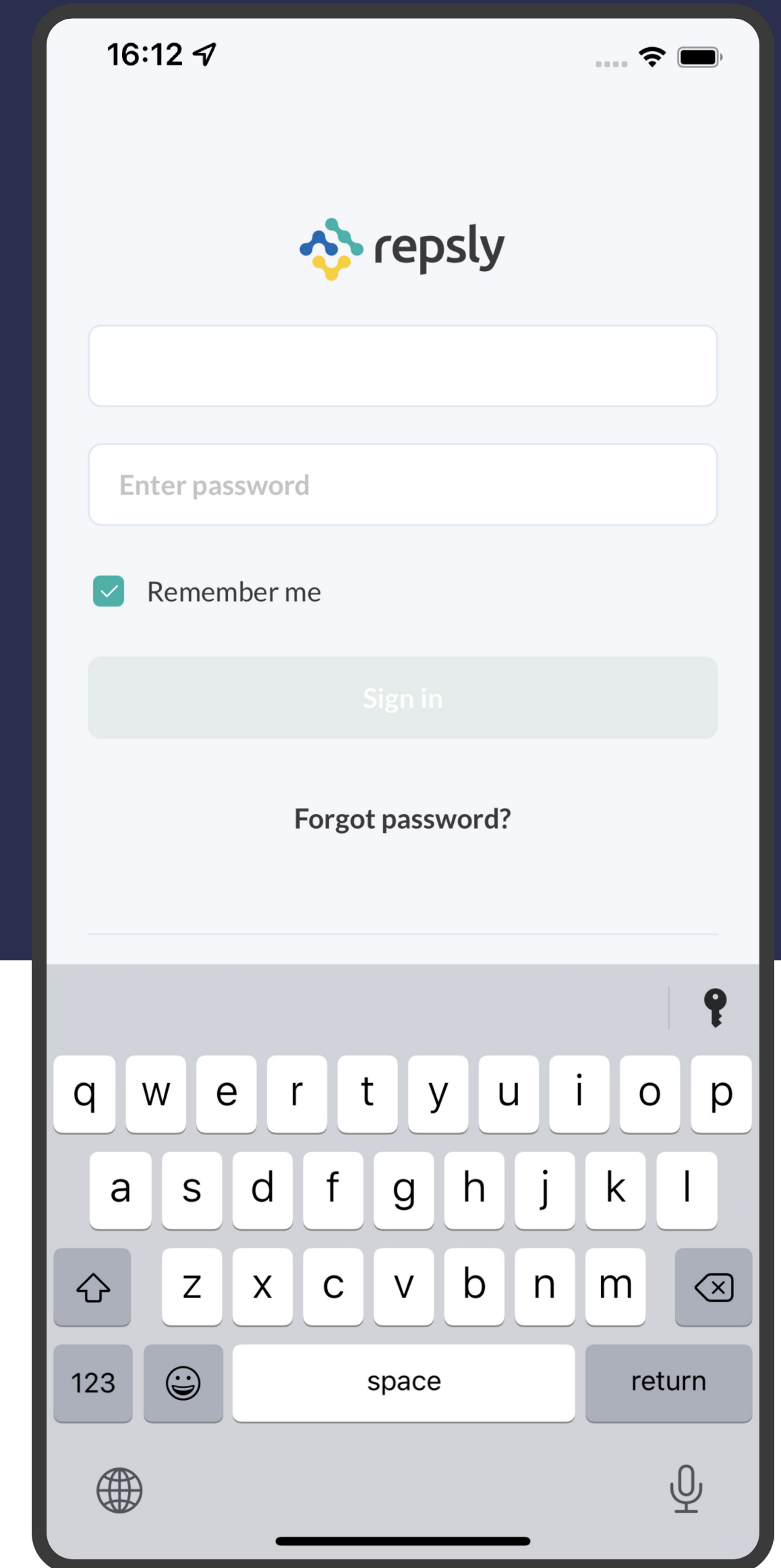
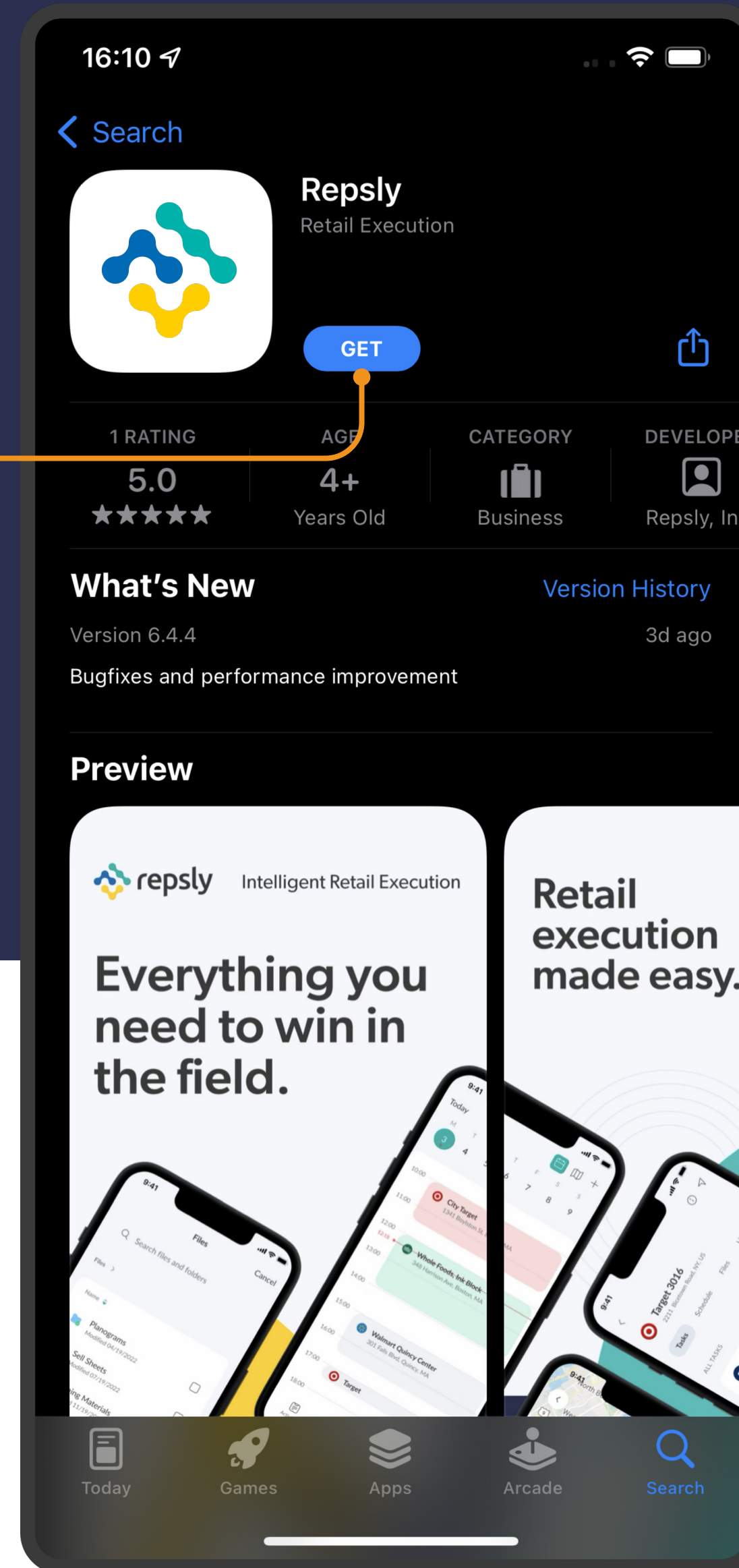
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01

HOW TO INSTALL REPSLY ON iOS

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.

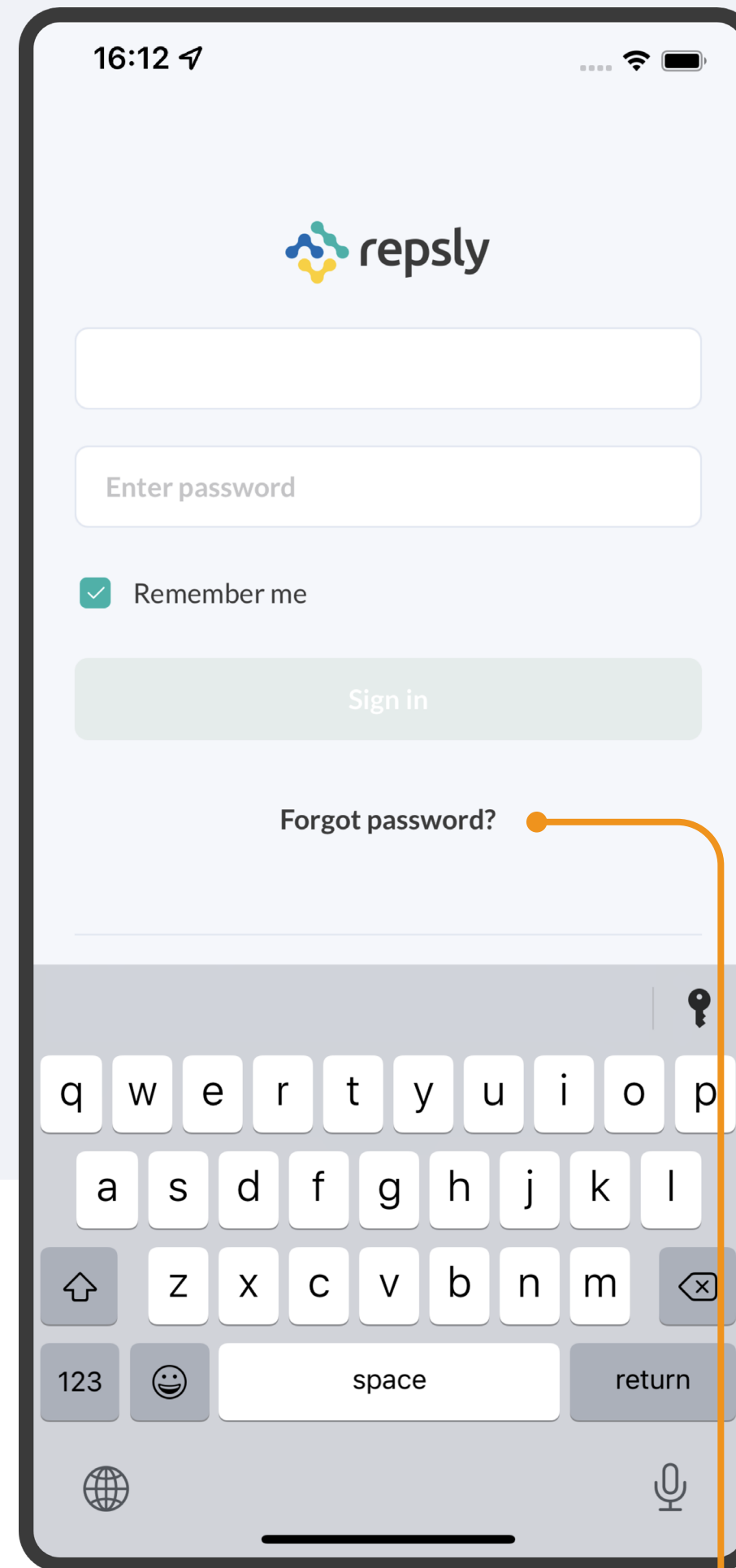
- 1 Open the App Store and search for **REPSLY**. Tap **GET**, then **OPEN**.
- 2 Press on the **GET STARTED** button. After you fill in credentials to login, click on **SIGN IN**.



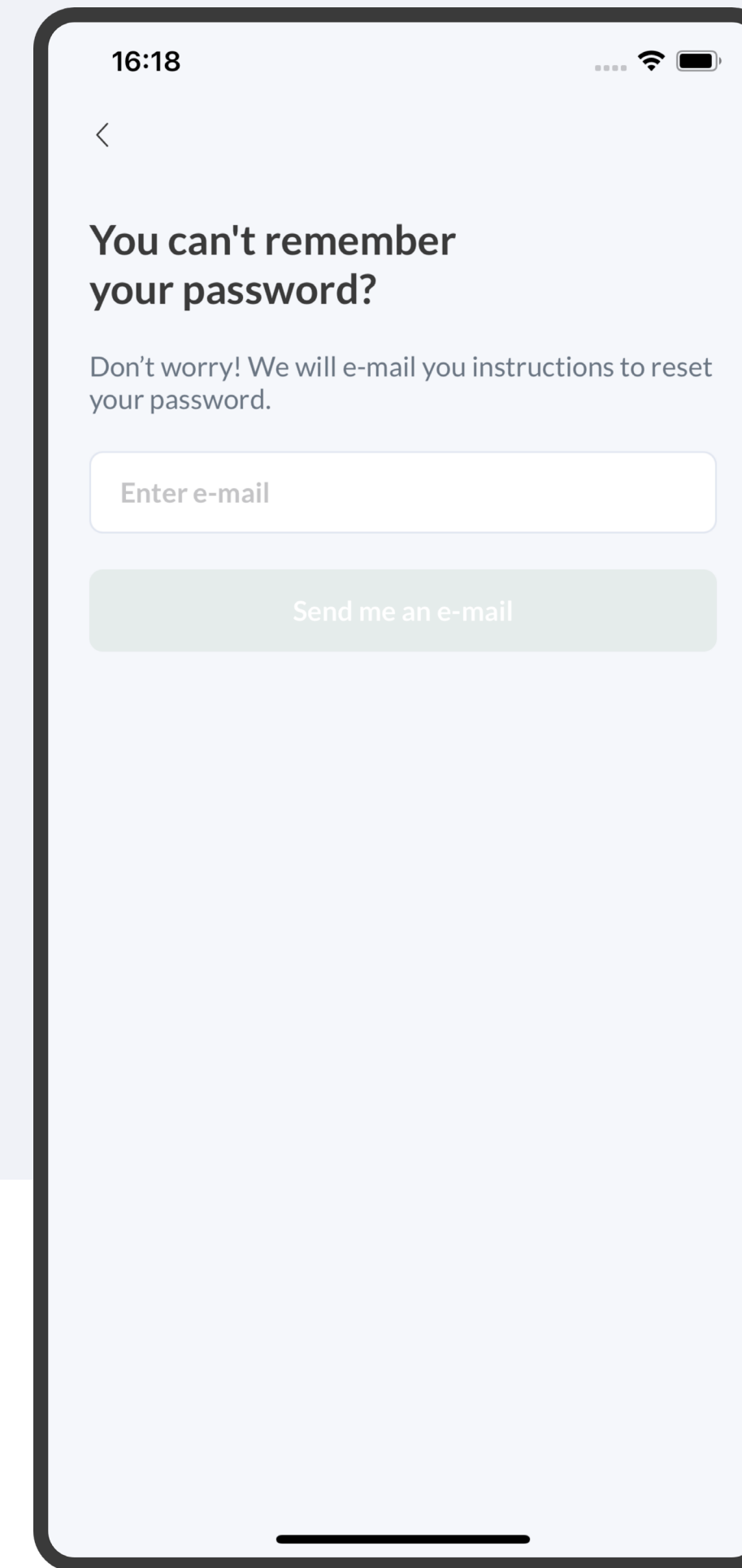
02 HOW TO CHANGE YOUR PASSWORD

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

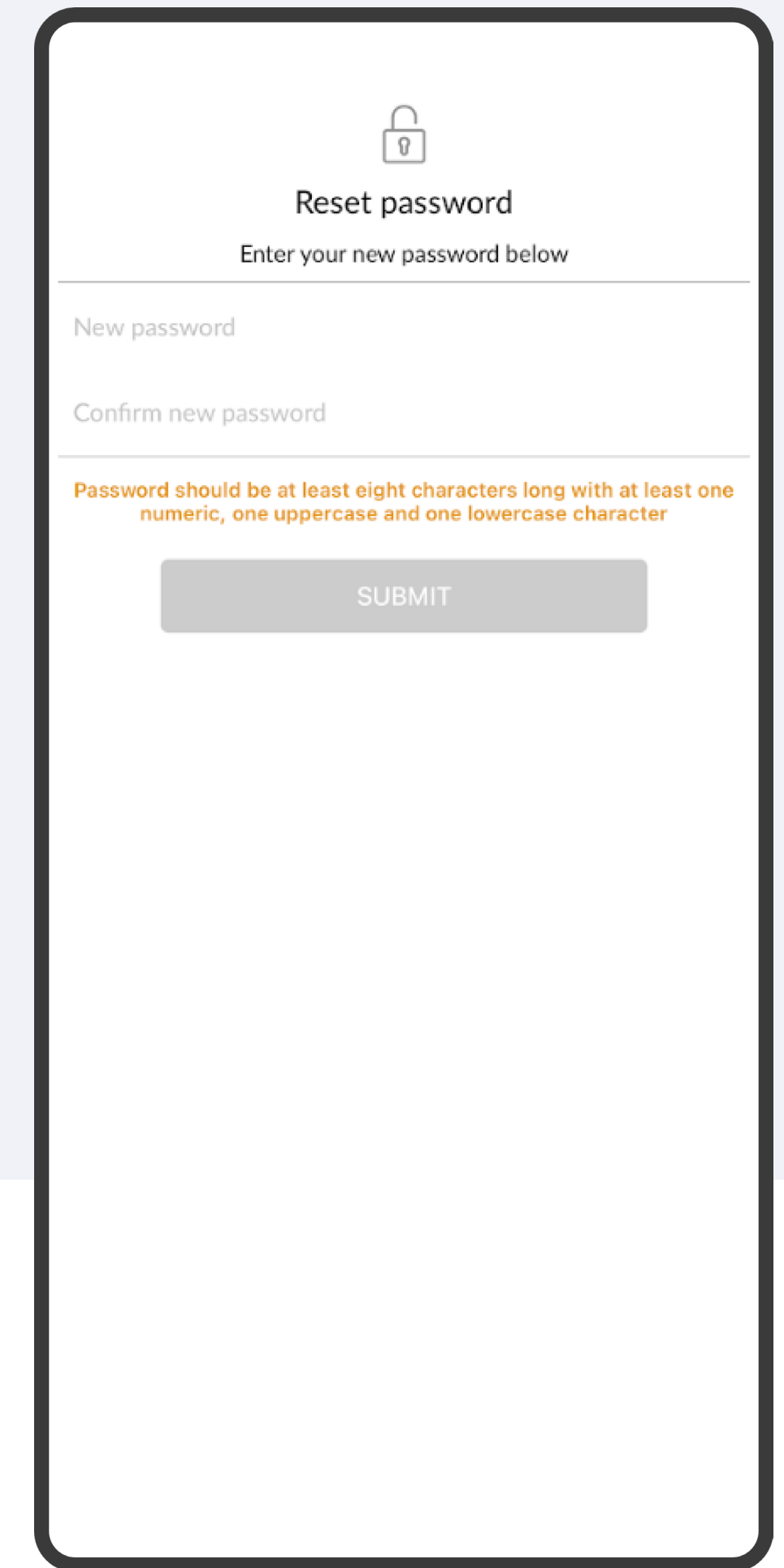
NOTE: If resetting the password isn't enabled for you, you will see a message saying *There has been a problem with your password reset request*. In this situation, your manager needs to enable the setting in the Repsly web app for you to be able to reset your password.



- 1 Tap **FORGOT PASSWORD** below the Sign in button.

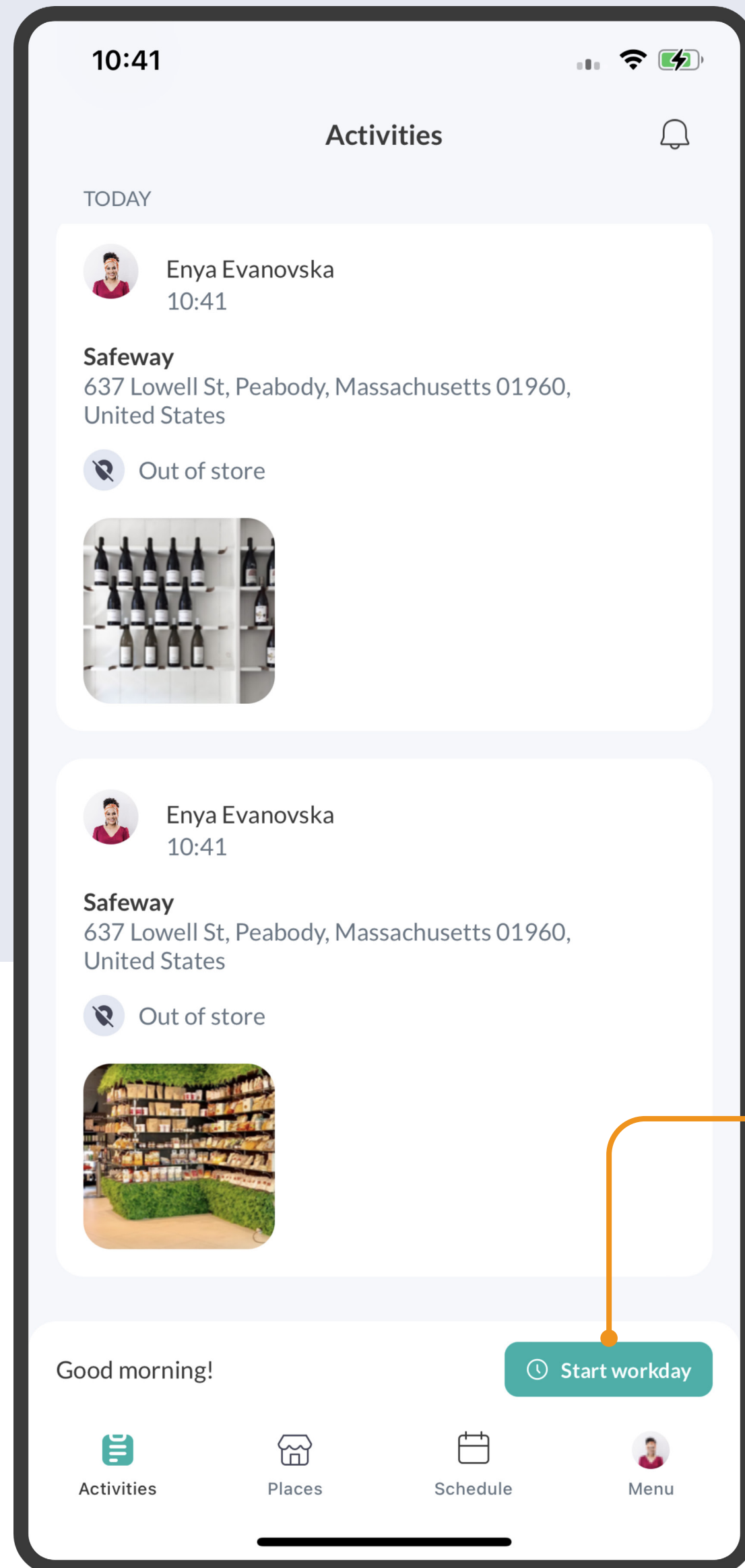


- 2 Enter your email address, and you will receive an email prompting you to enter and confirm your new password.



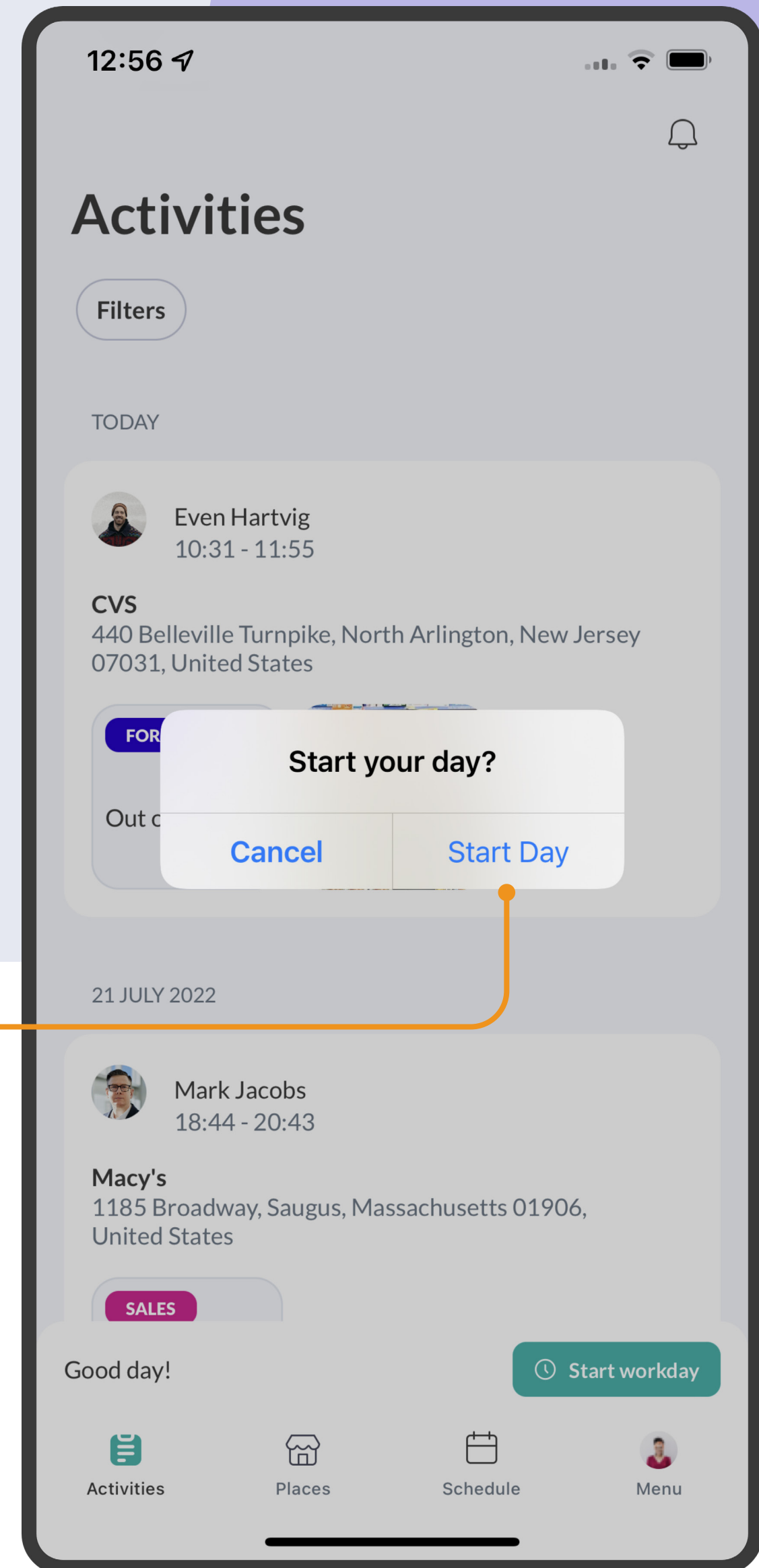
03 HOW TO START YOUR DAY

Repsly can automatically keep track of your working hours and mileage in the background while you work, so you don't need to enter these details manually.



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

Your day will start after **2** clicking on **START DAY**.

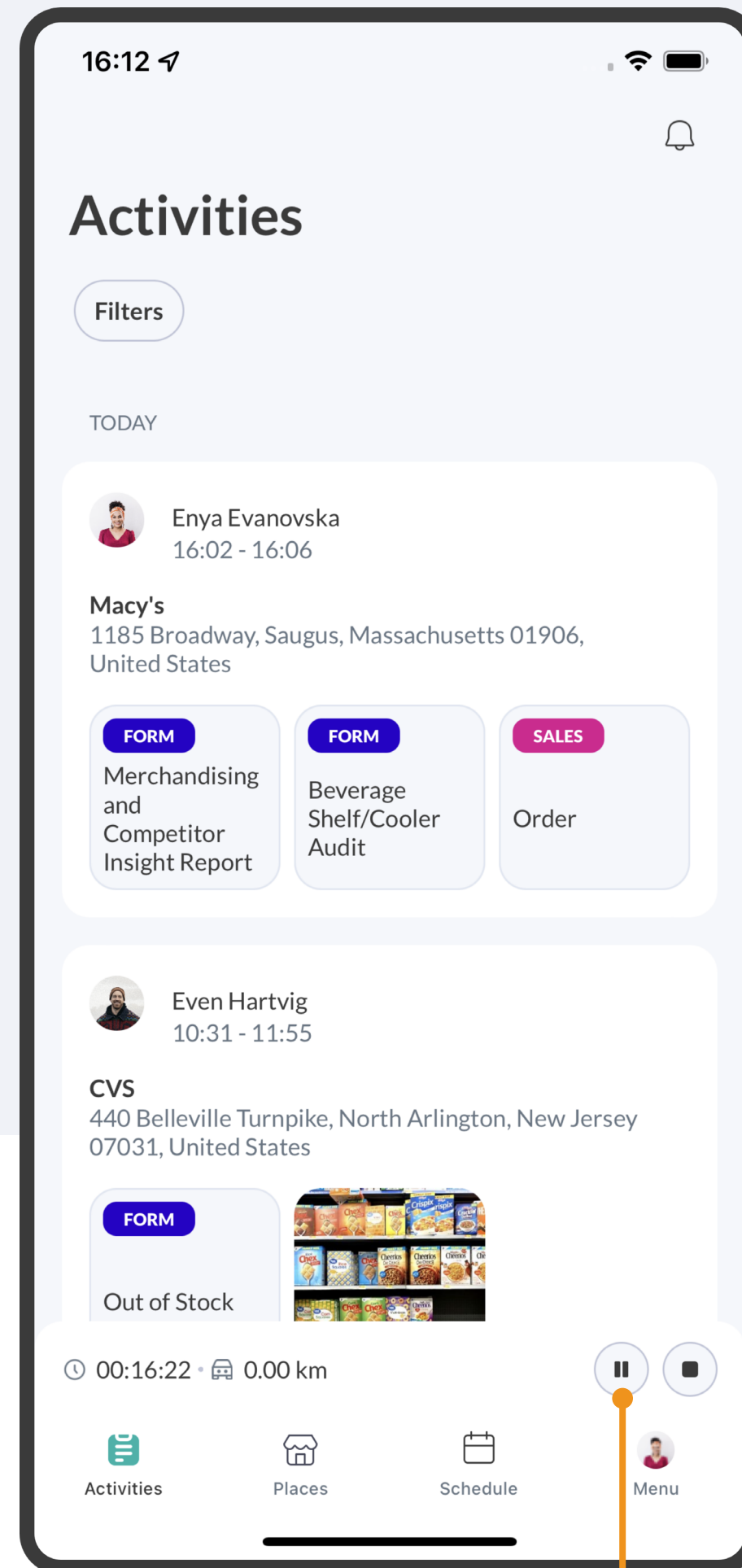


04

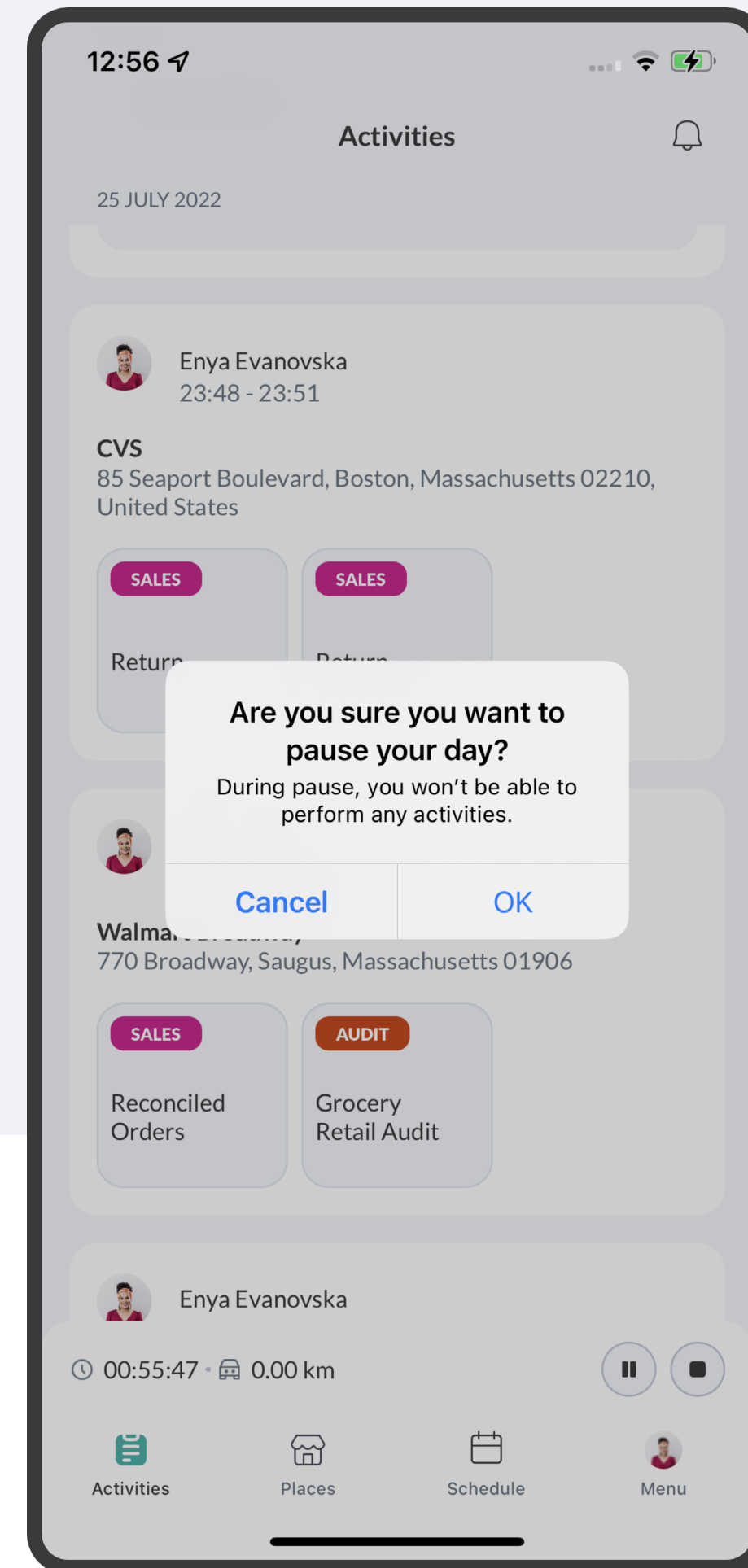
HOW TO PAUSE YOUR DAY

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.

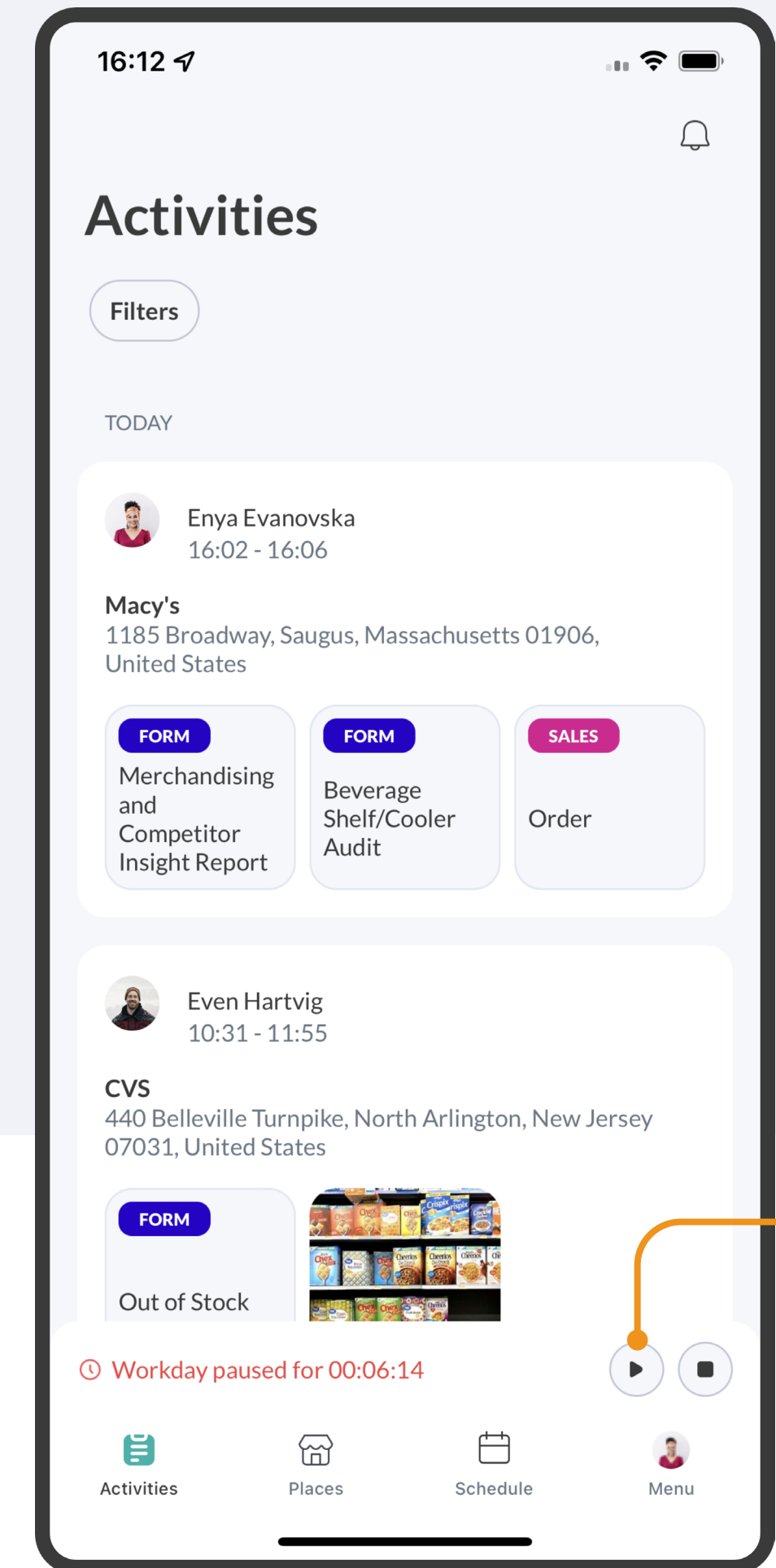
NOTE: You cannot pause your day while checked into a place.



1 Tap **PAUSE**.



2 Confirm you'd like to pause your workday.



3 Tap the **PLAY** icon to resume your workday.

05

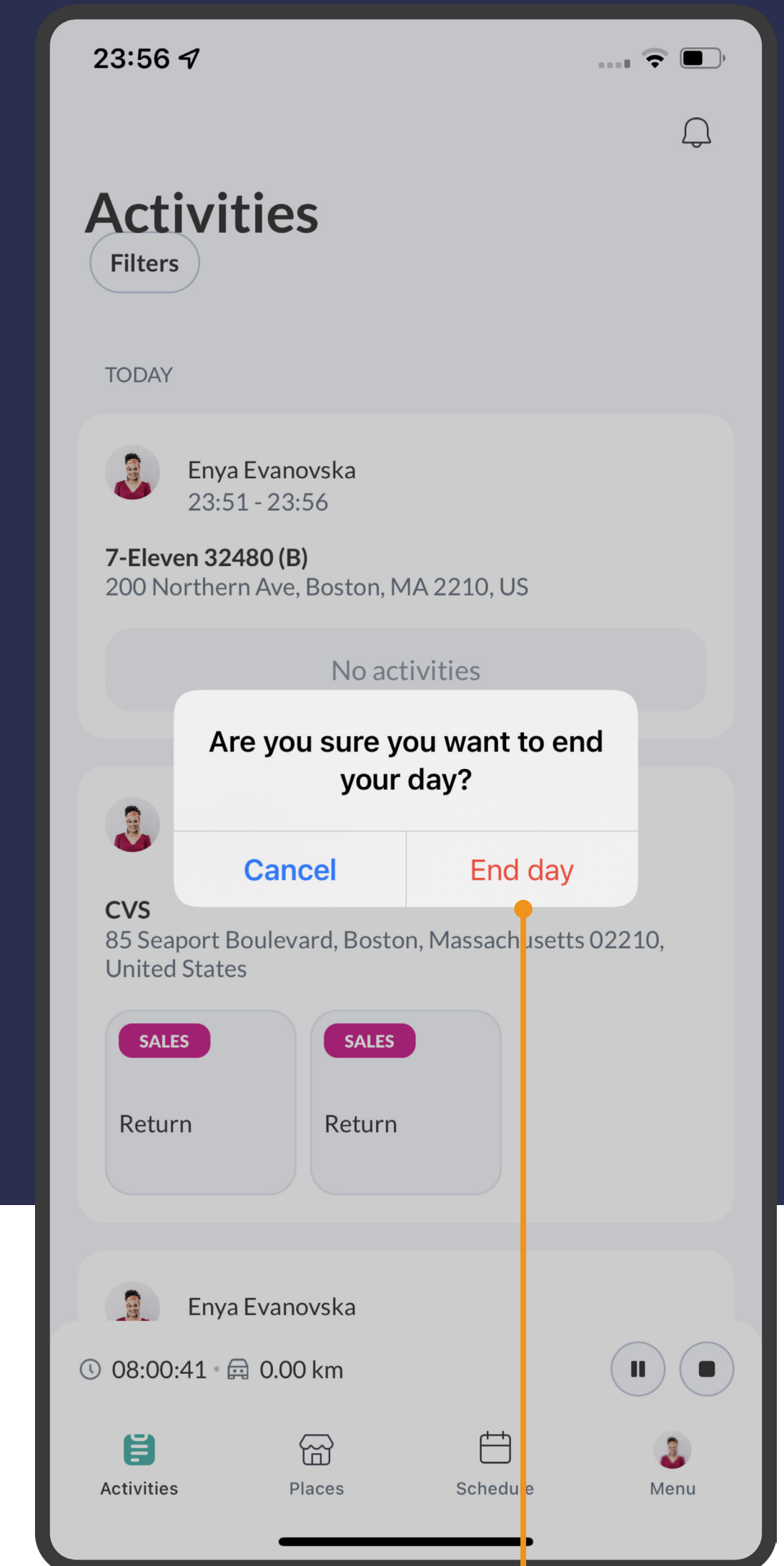
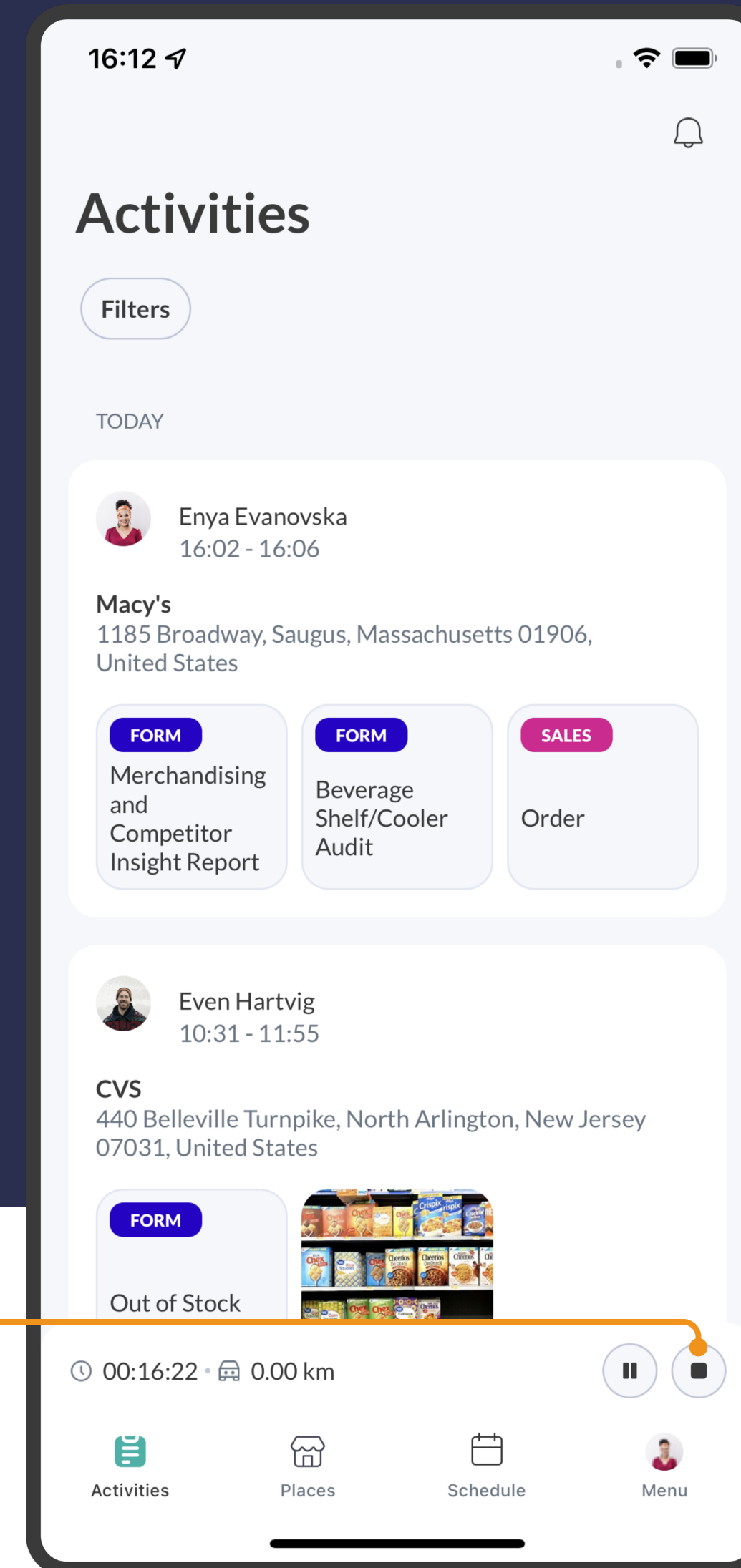
HOW TO END YOUR DAY

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.

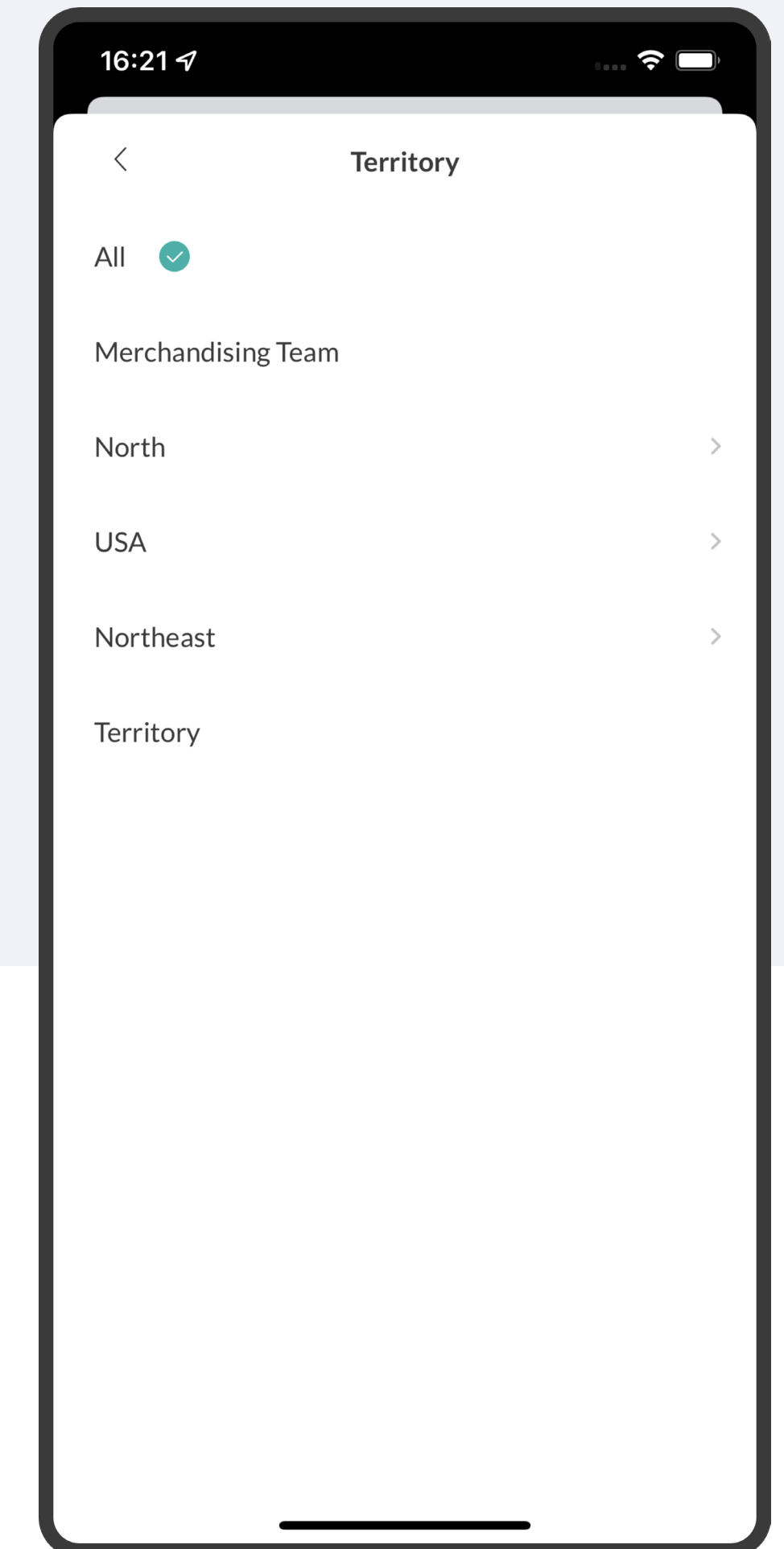
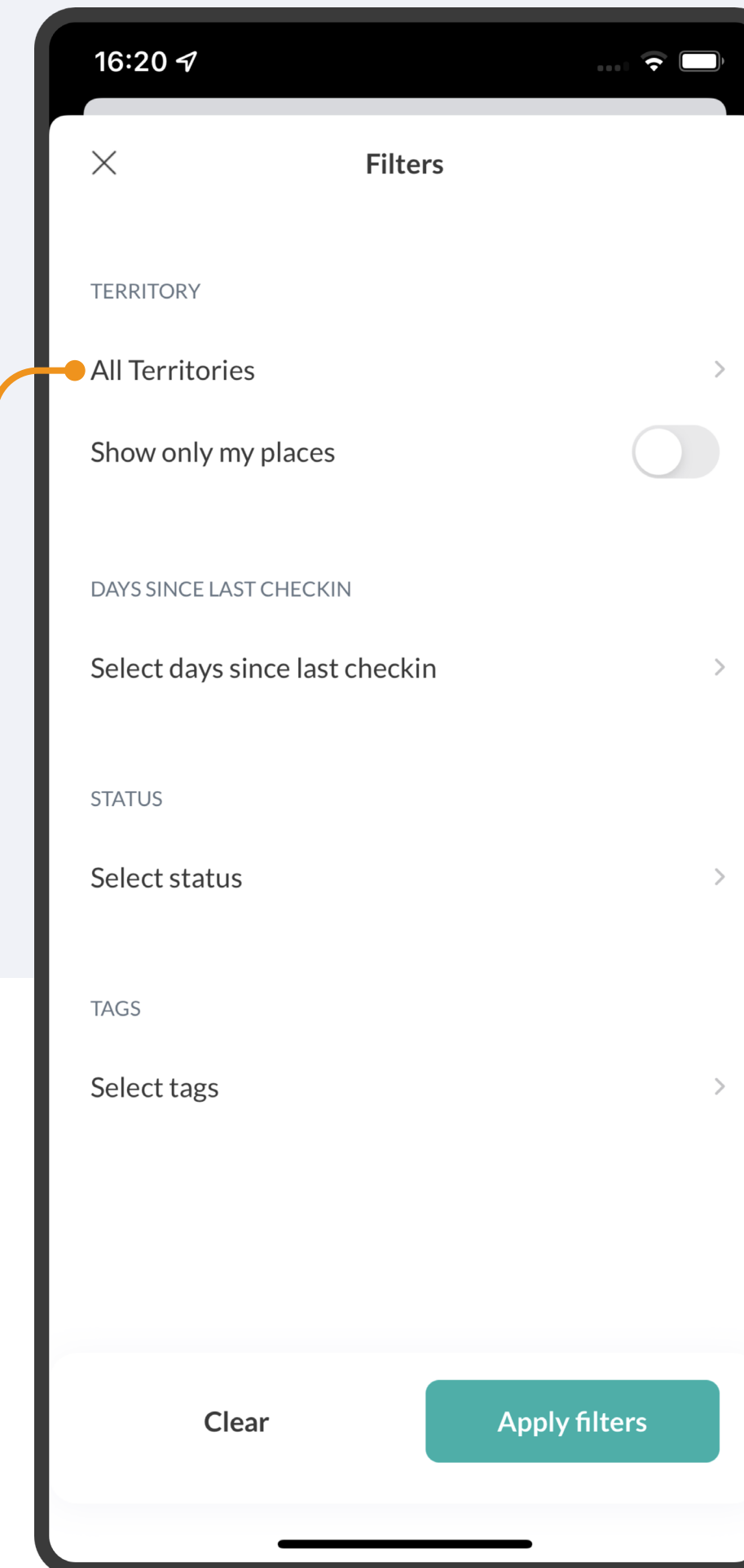
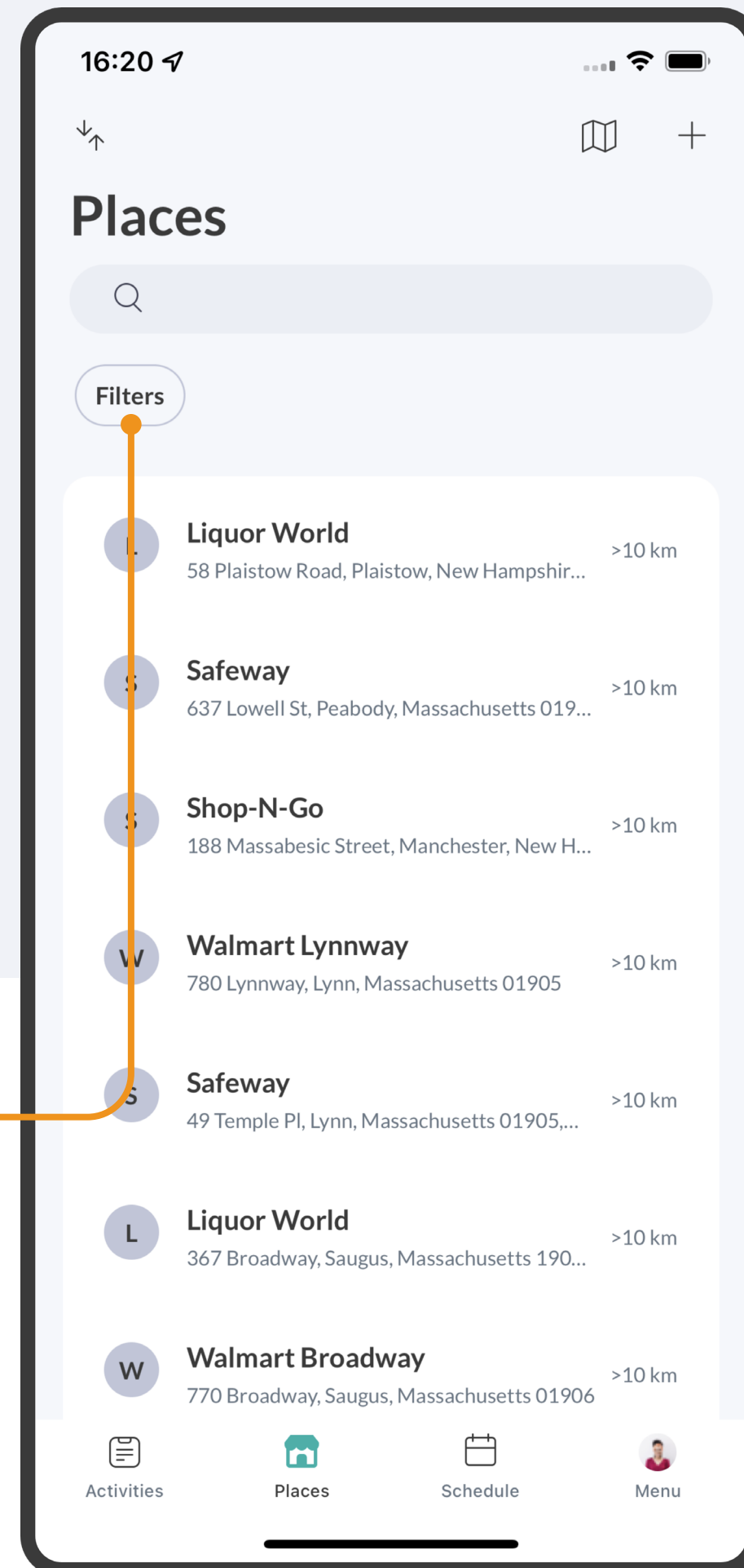


06

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.

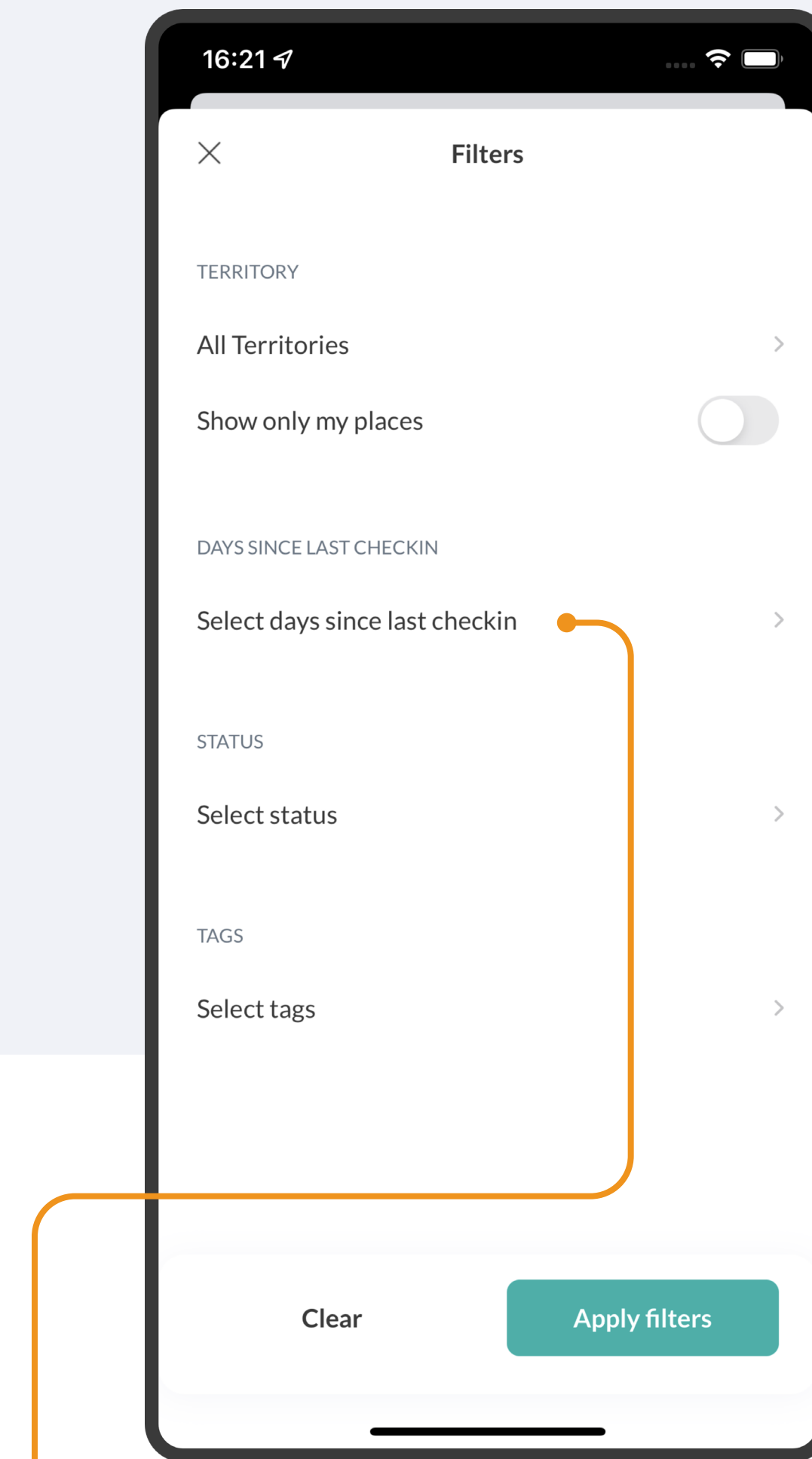
- 1 To switch territories, tap on the **PLACES** tab and then on the **FILTER** icon.
- 2 Tap **ALL TERRITORIES**, then select the available territory you'd like to display.



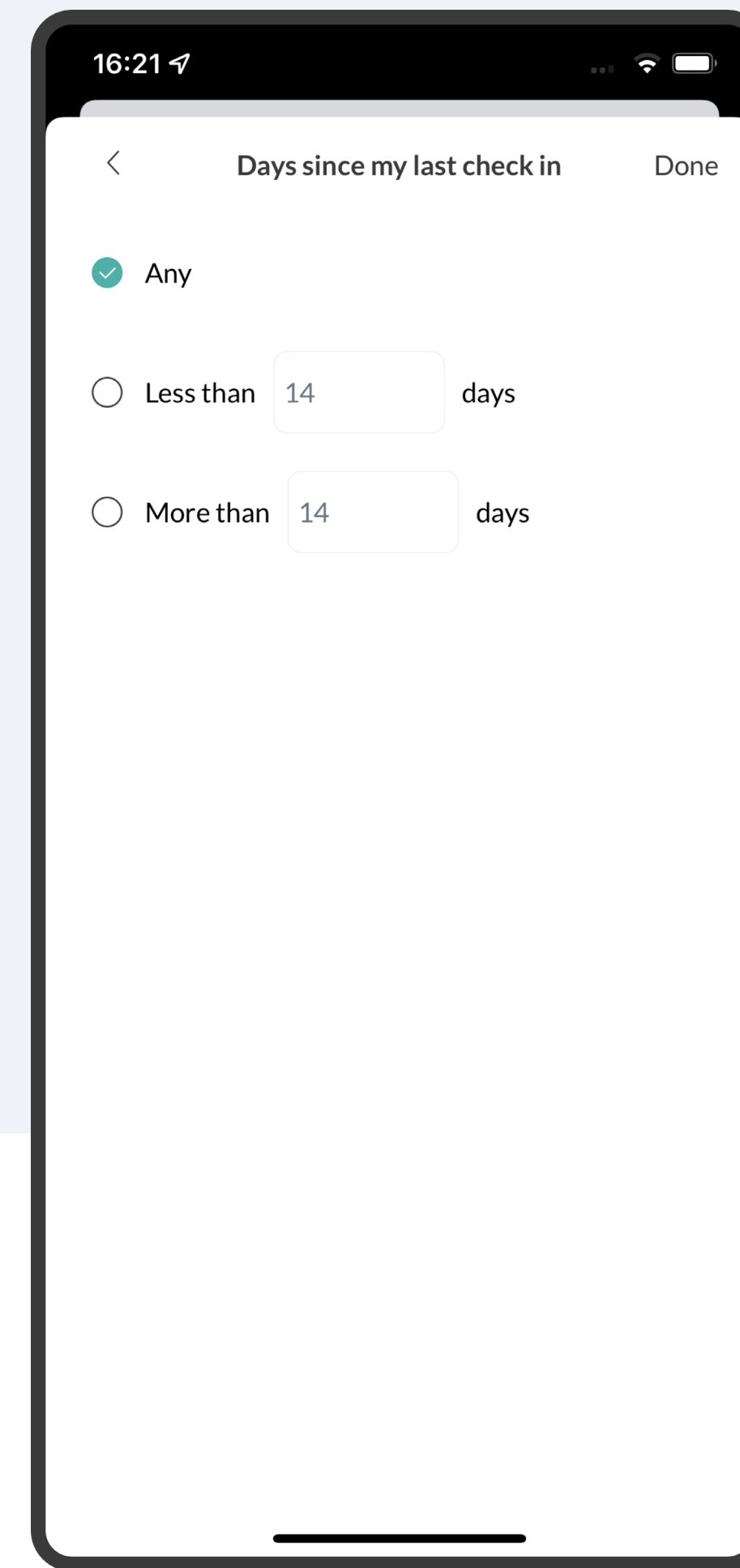
07

HOW TO FIND PLACES THAT HAVEN'T BEEN VISITED

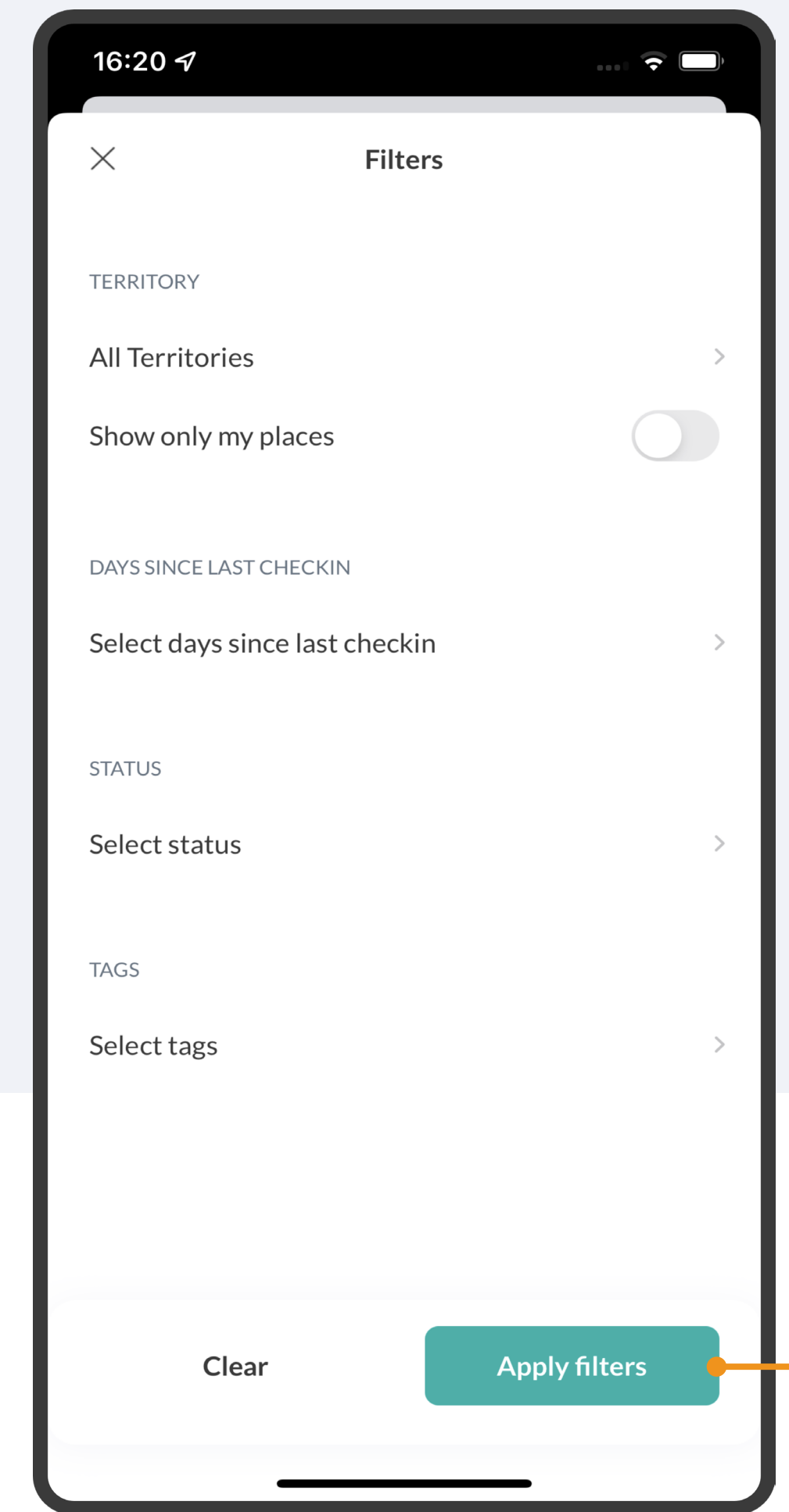
Repsly makes it easy to improve territory coverage by showing you the places you haven't visited recently, so you can add them to your schedule for follow-up.



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.

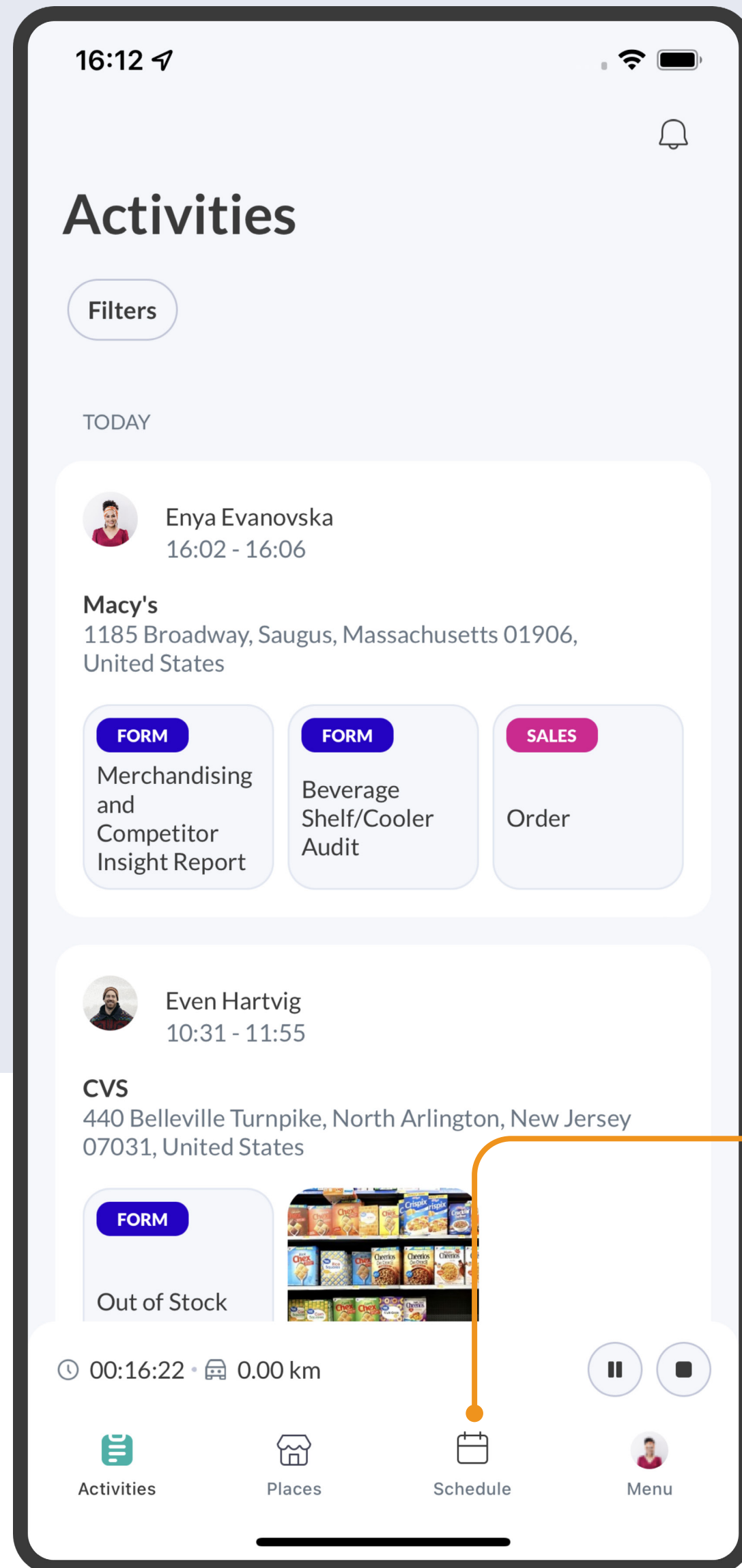


3 You can narrow down the criteria further using additional filters (such as place or tags). Click **APPLY FILTERS** to view your refined place list.

08

HOW TO USE THE SCHEDULE

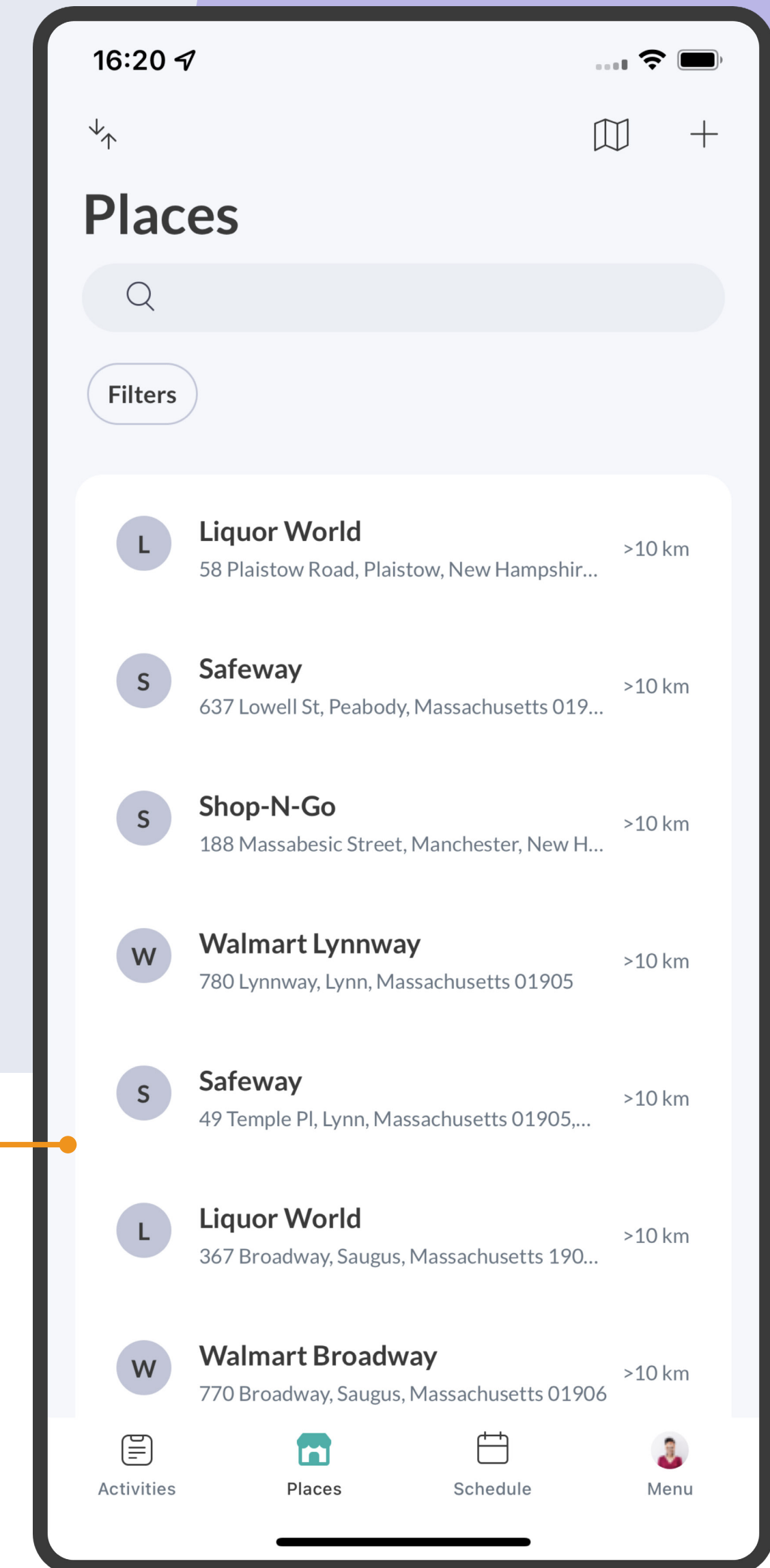
The schedule gives you a snapshot of everything you need to do for the day. Depending on your account settings, you can also proactively manage your visits, set follow-up meetings from the field, or make changes to your schedule on the go as priorities change.

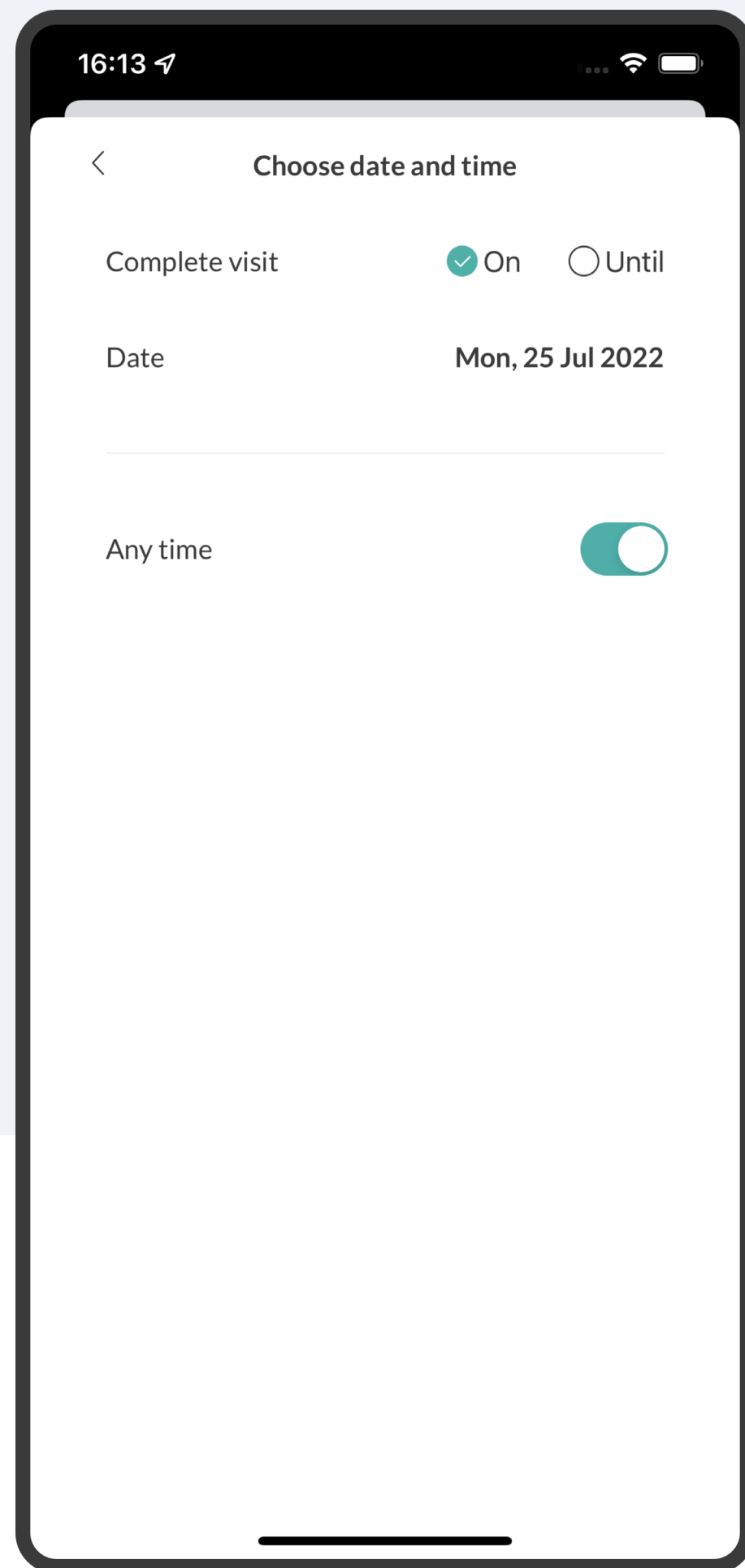


1 Tap on the **SCHEDULE** tab.

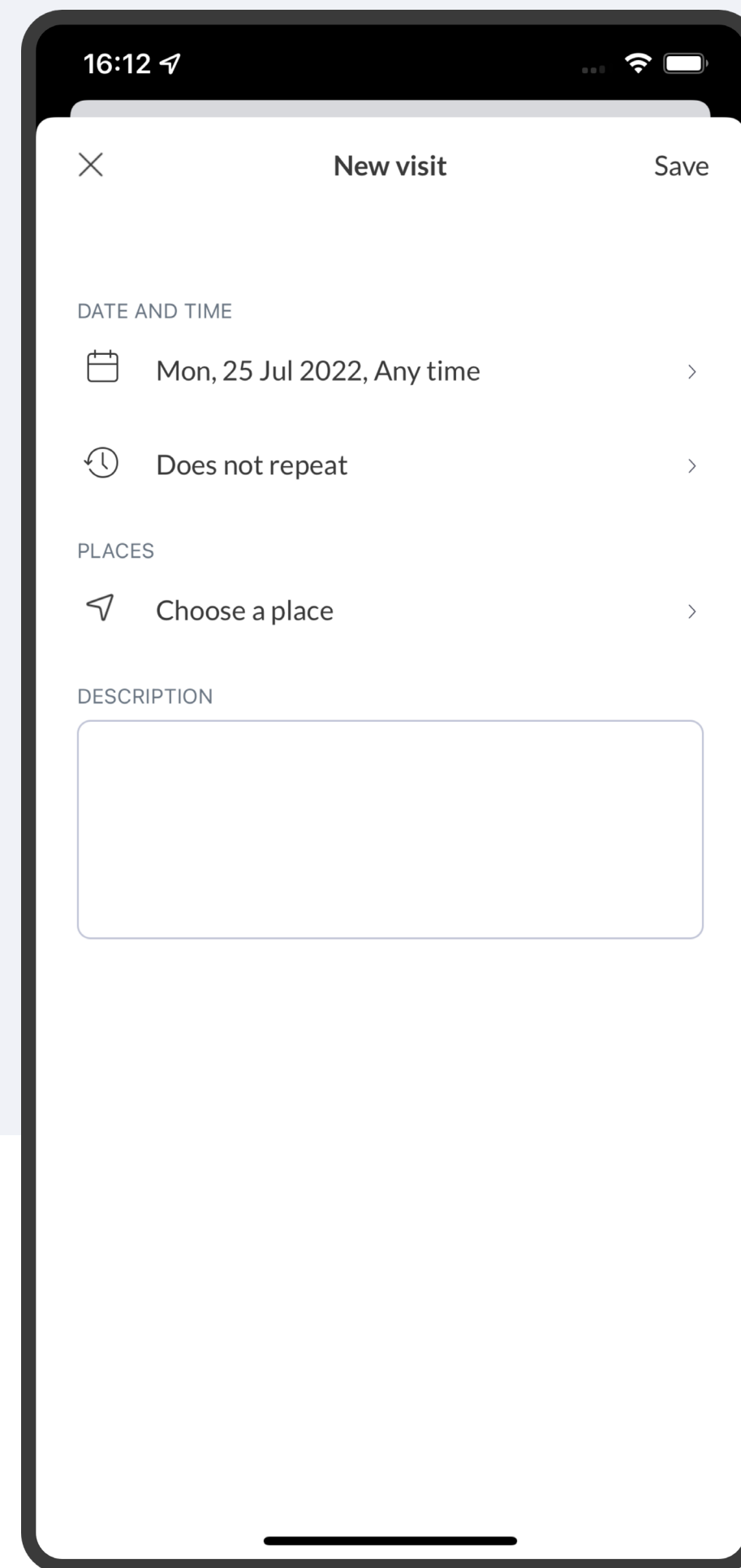
Select the place you wish to schedule a visit for.

2

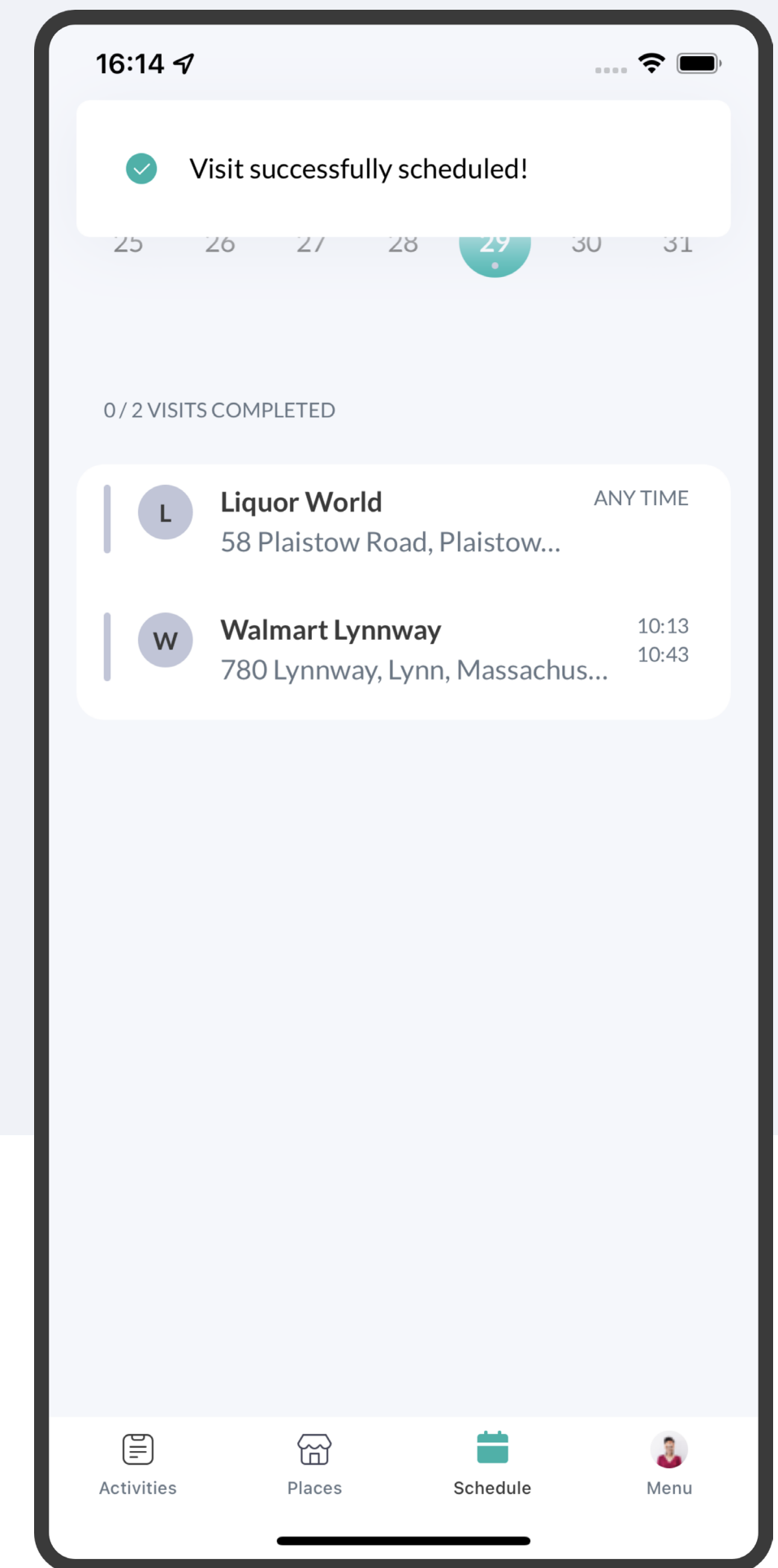




3 Select the **DATE** and **TIME** for the visit.



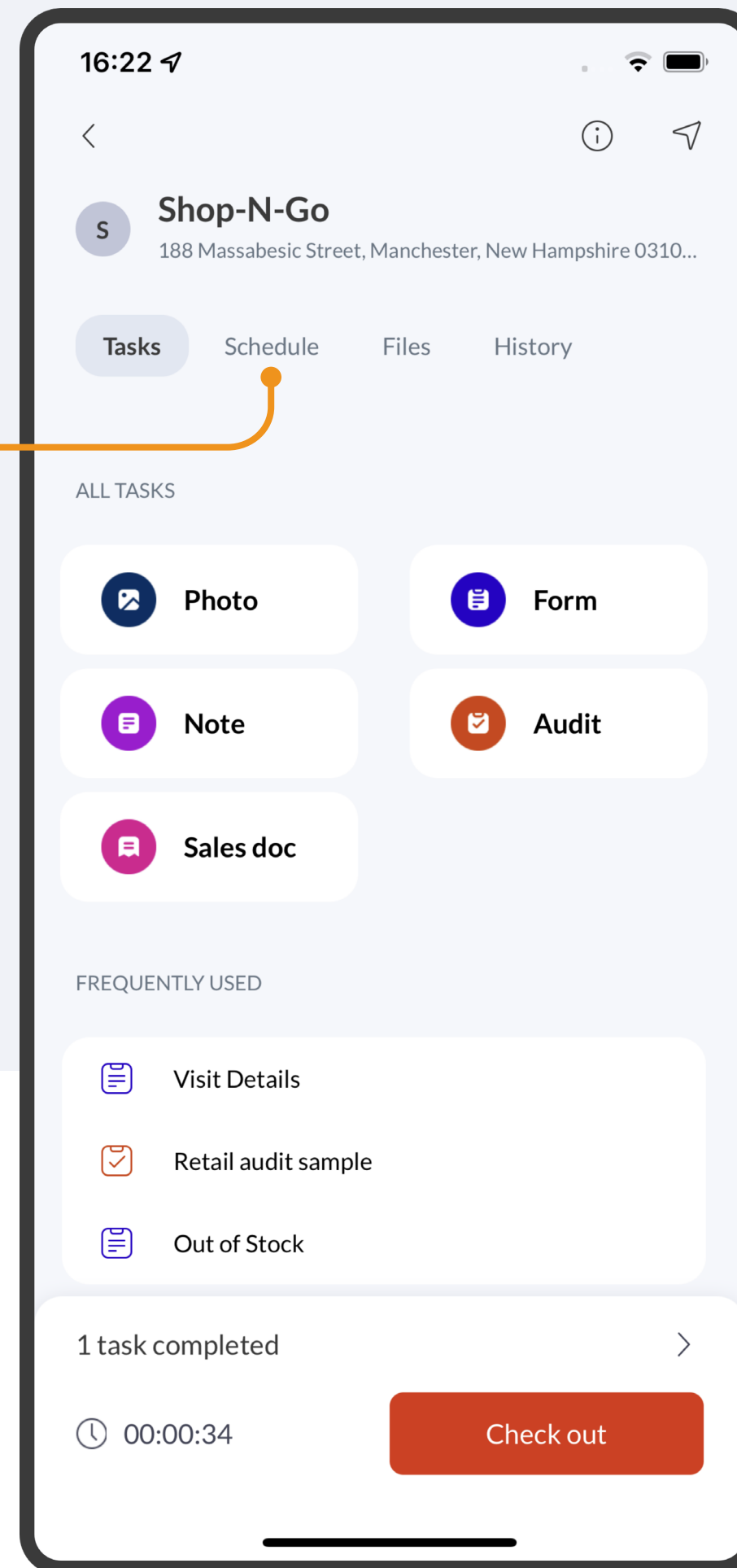
4 On this page, you can also select whether or not the visit is recurring and leave a note about the visit.



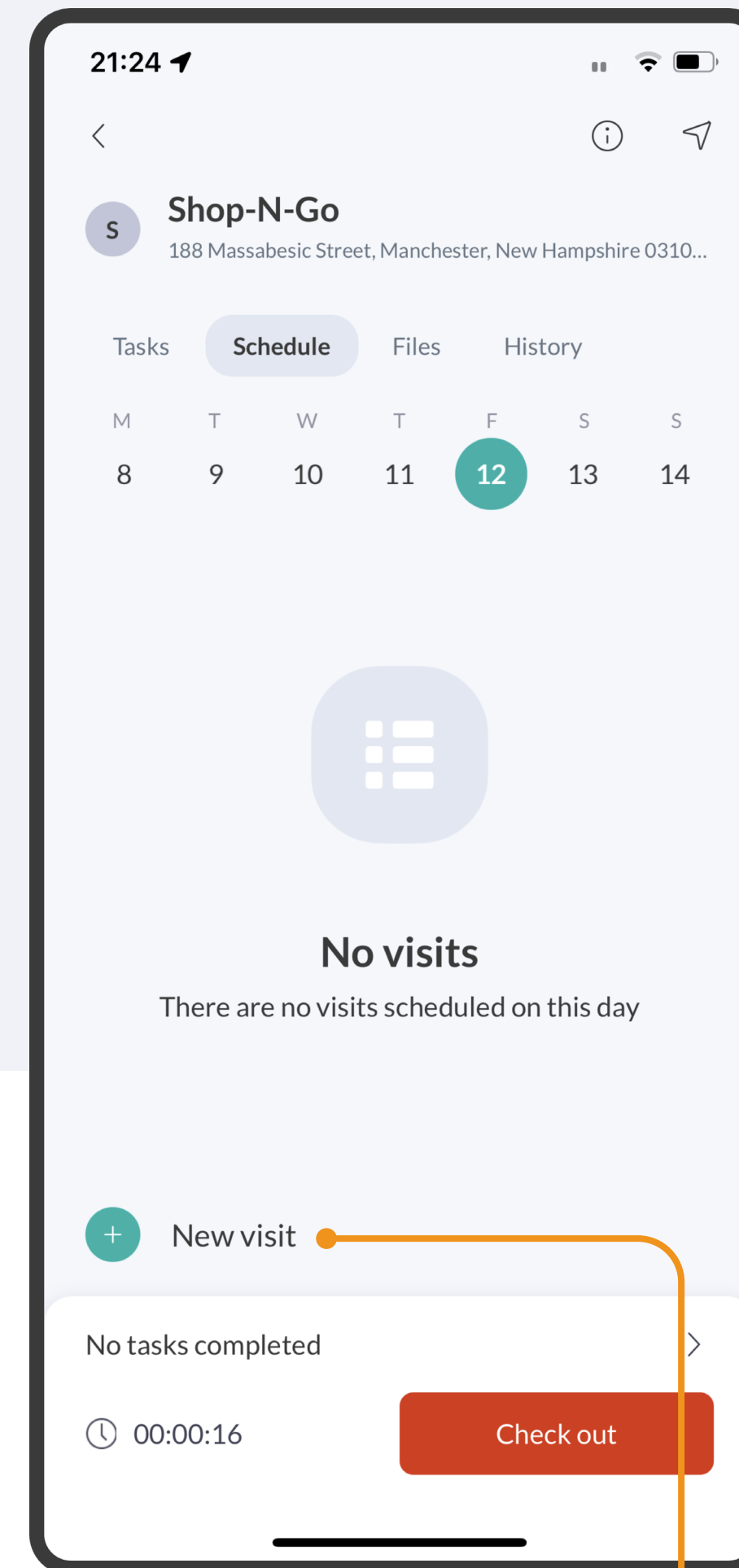
5 Scheduled visit will be visible in the schedule like this.

HOW TO ADD VISITS FROM THE PLACE PAGE

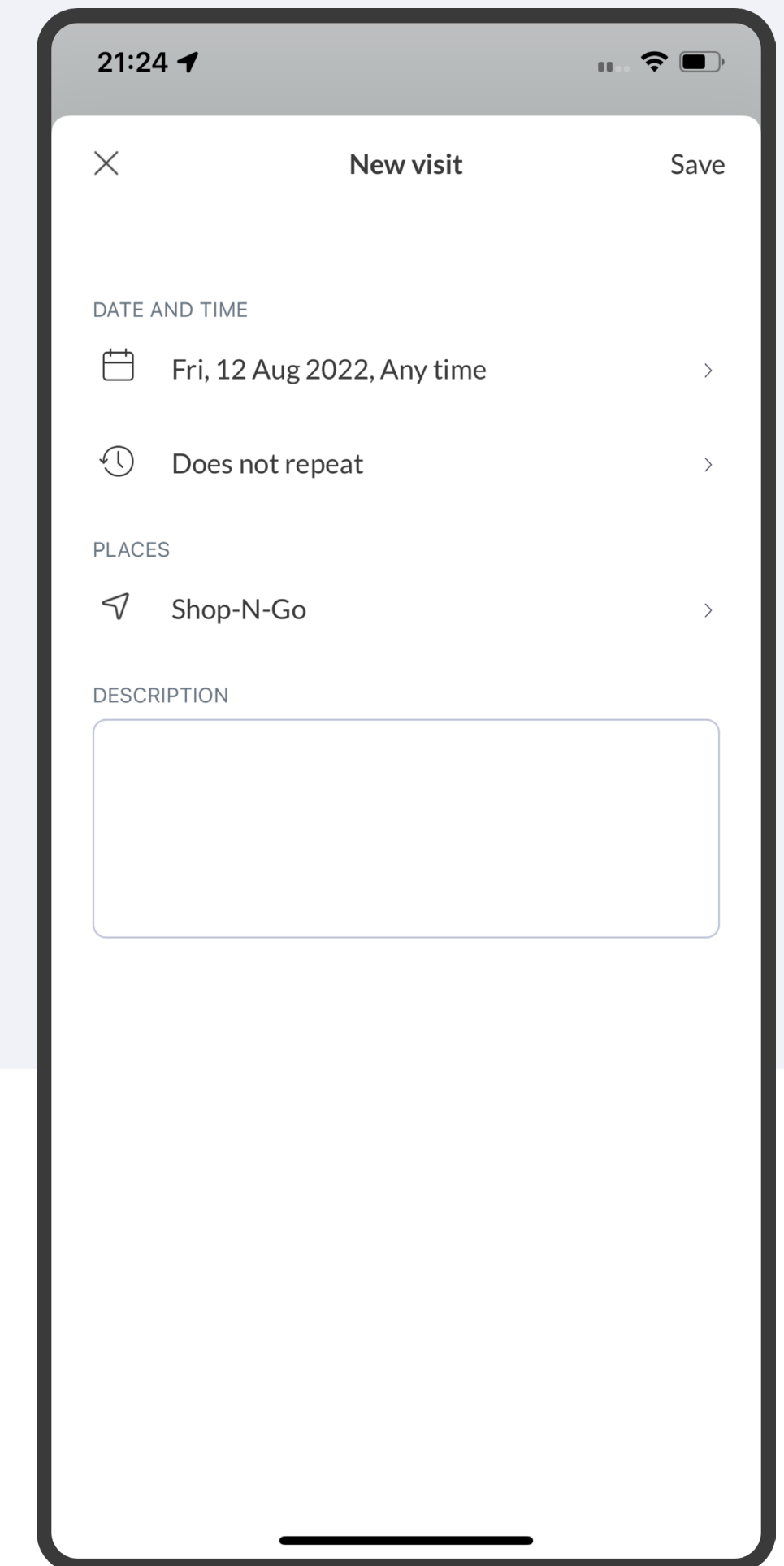
You can also schedule new visits right from the Place page, making it easy to add follow-up visits while checked into a place or reviewing the account history.



1 Select a place for which you want to schedule a visit. Click on the **SCHEDULE**.



2 Click on a **NEW VISIT**.

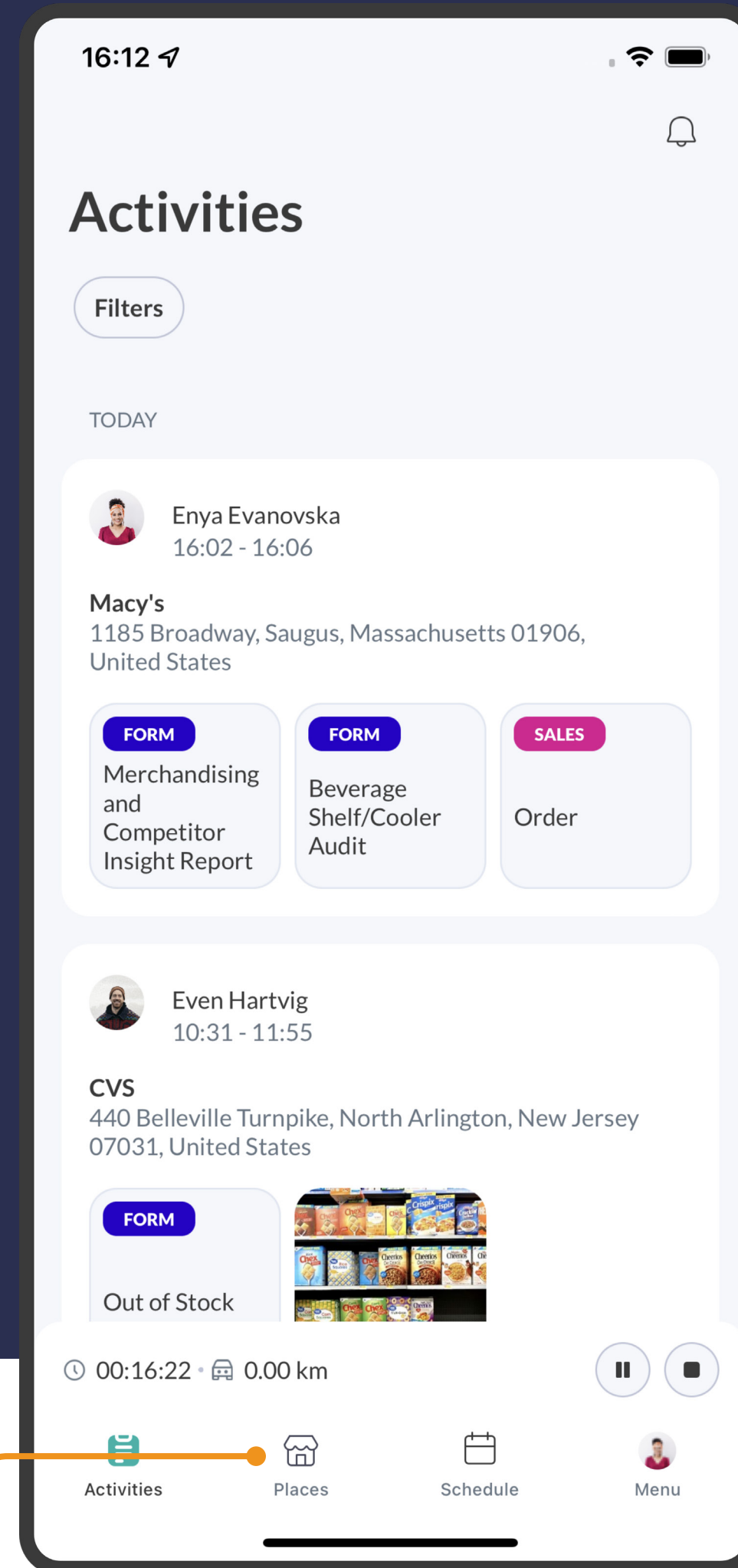


3 Select the **DATE** and **TIME** for the visit. You can also select whether or not the visit is recurring and leave a note about the visit.

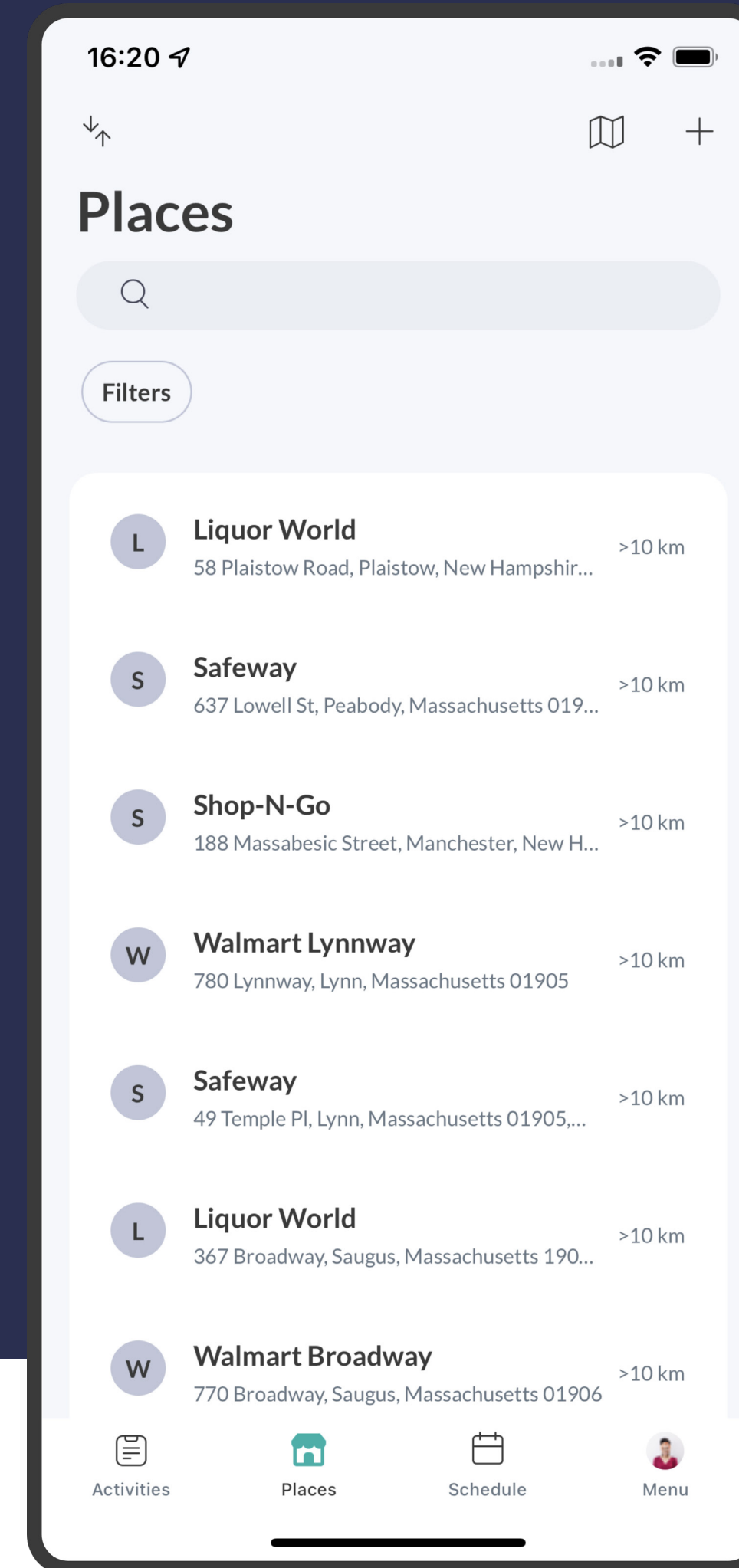
09

HOW TO CHECK IN

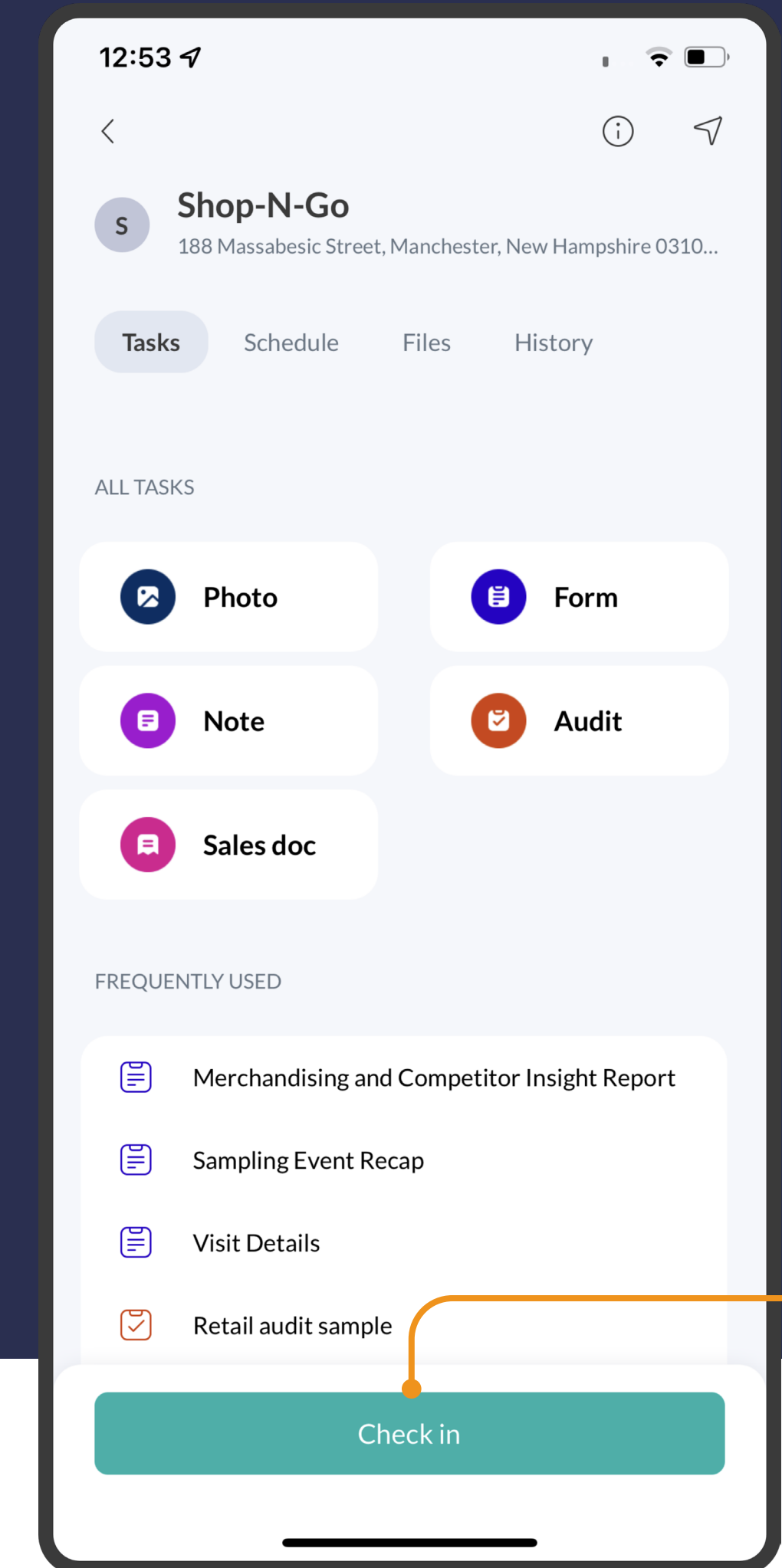
Checking into a place at the beginning of each visit makes sure all of your activity gets properly tagged to the right place, and helps you better understand how you spend your time during the workday.



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.

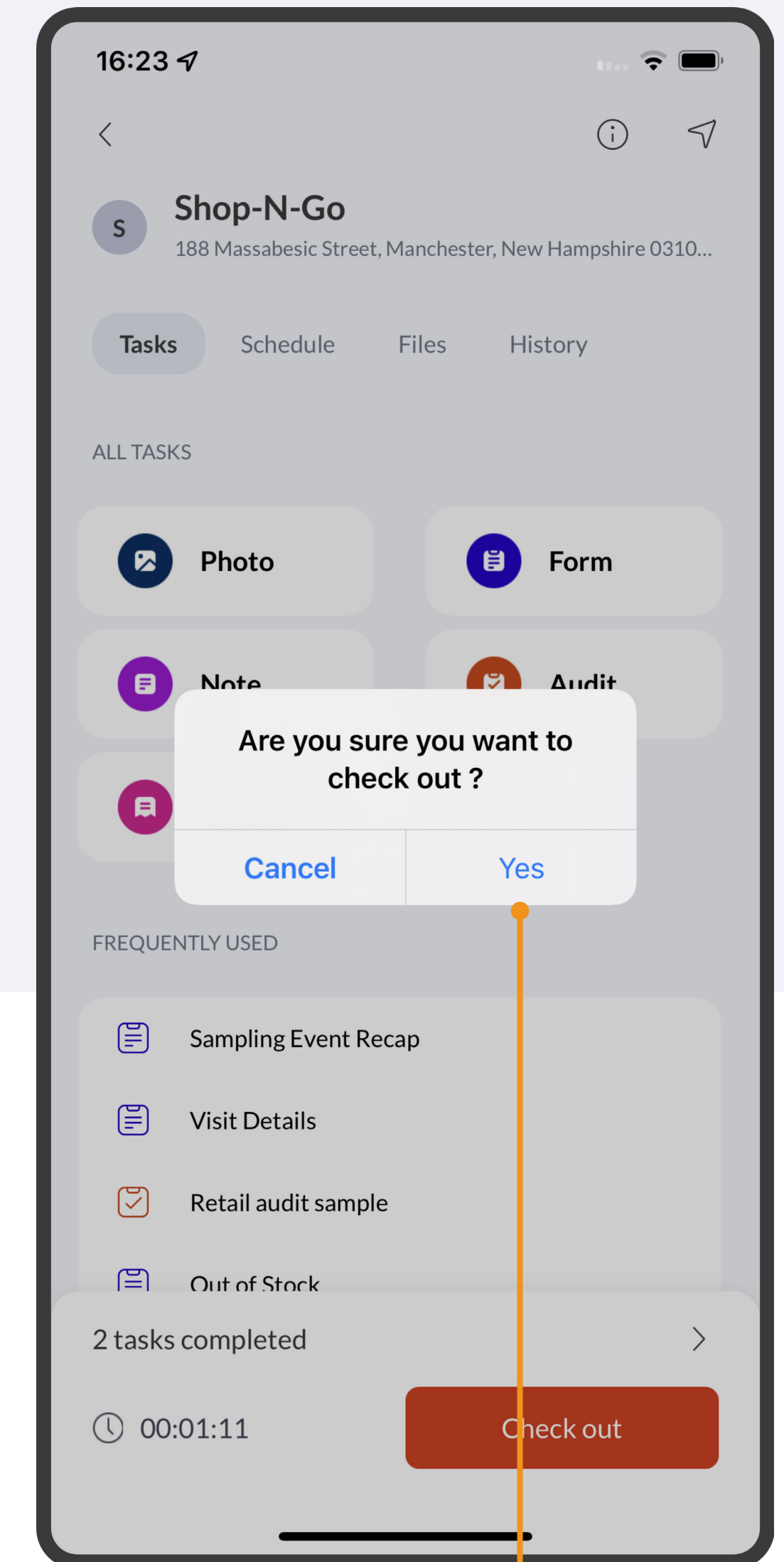
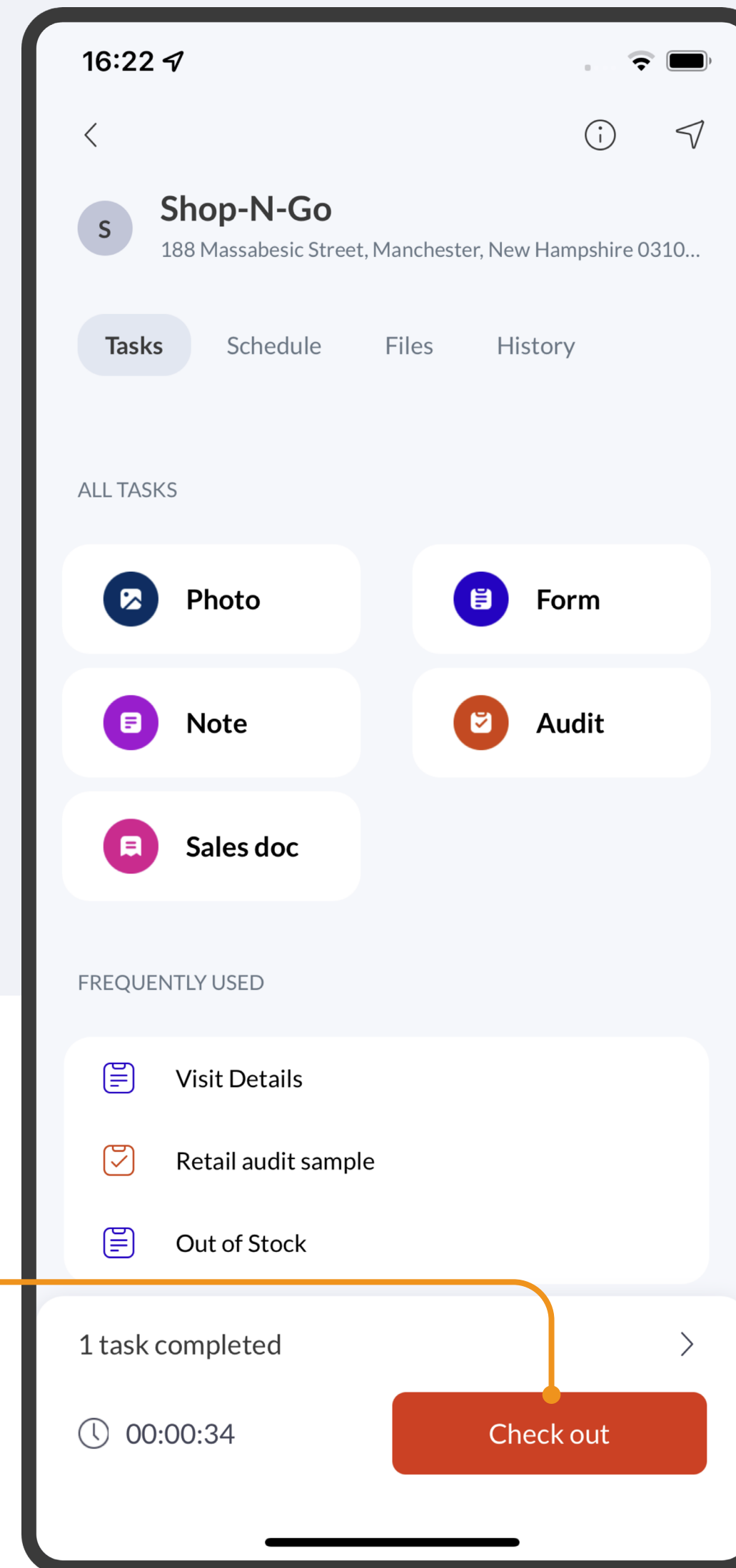
10

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.

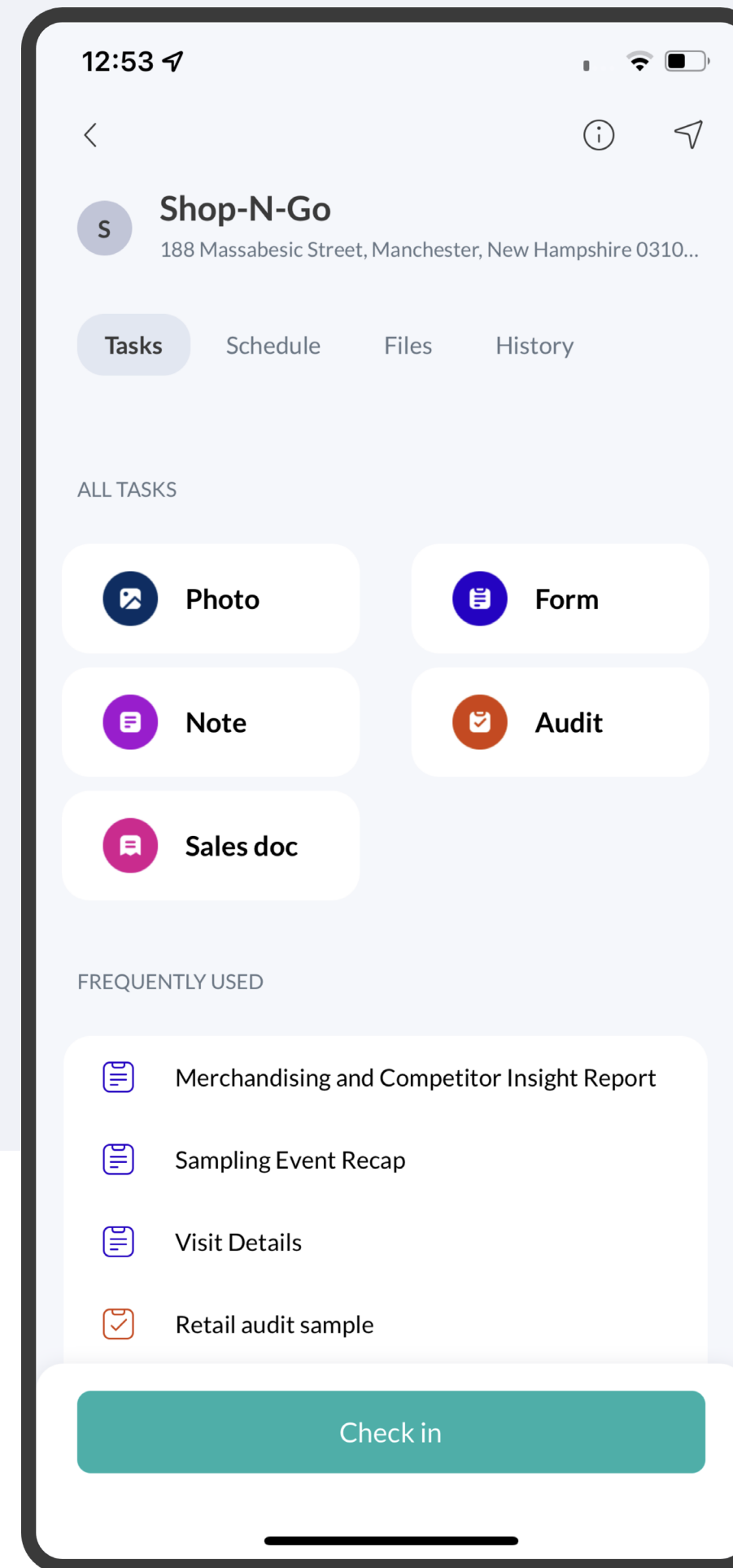
NOTE: If you don't check out from a store, you will see a red dot at the Places icon that will remind you that you're still checked in.

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

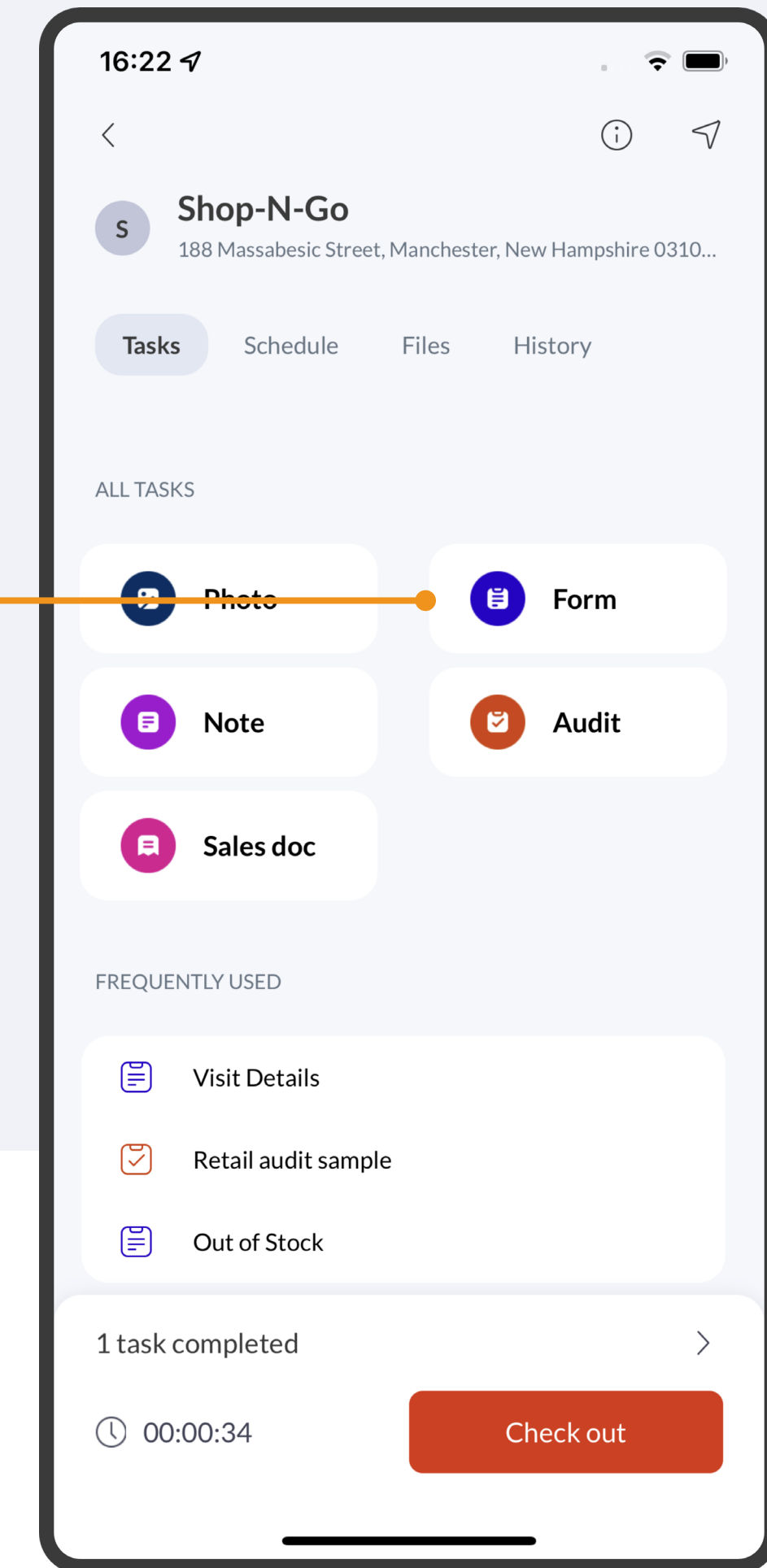


11 HOW TO FILL OUT A FORM

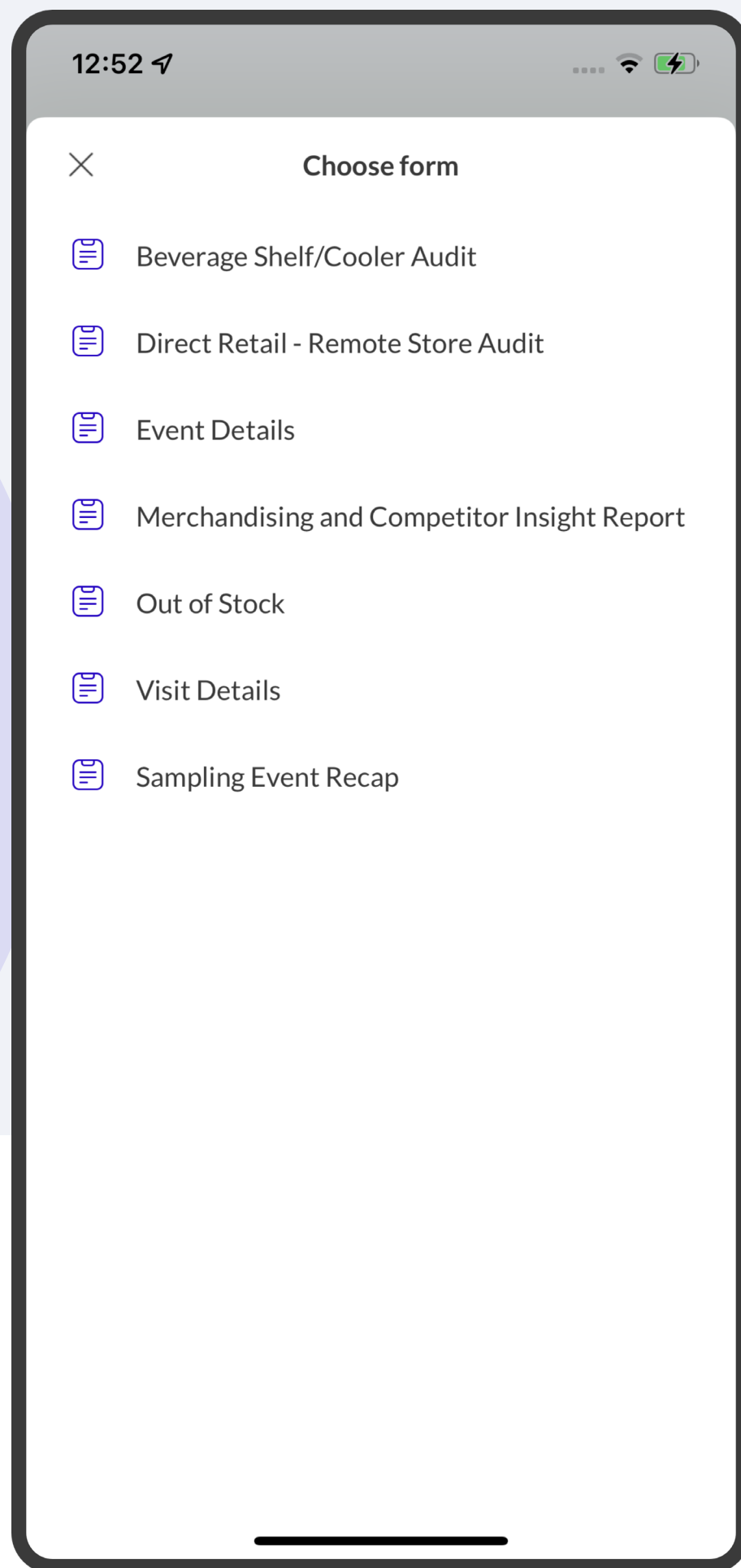
Forms are the perfect way for you to capture data and store-level insights.



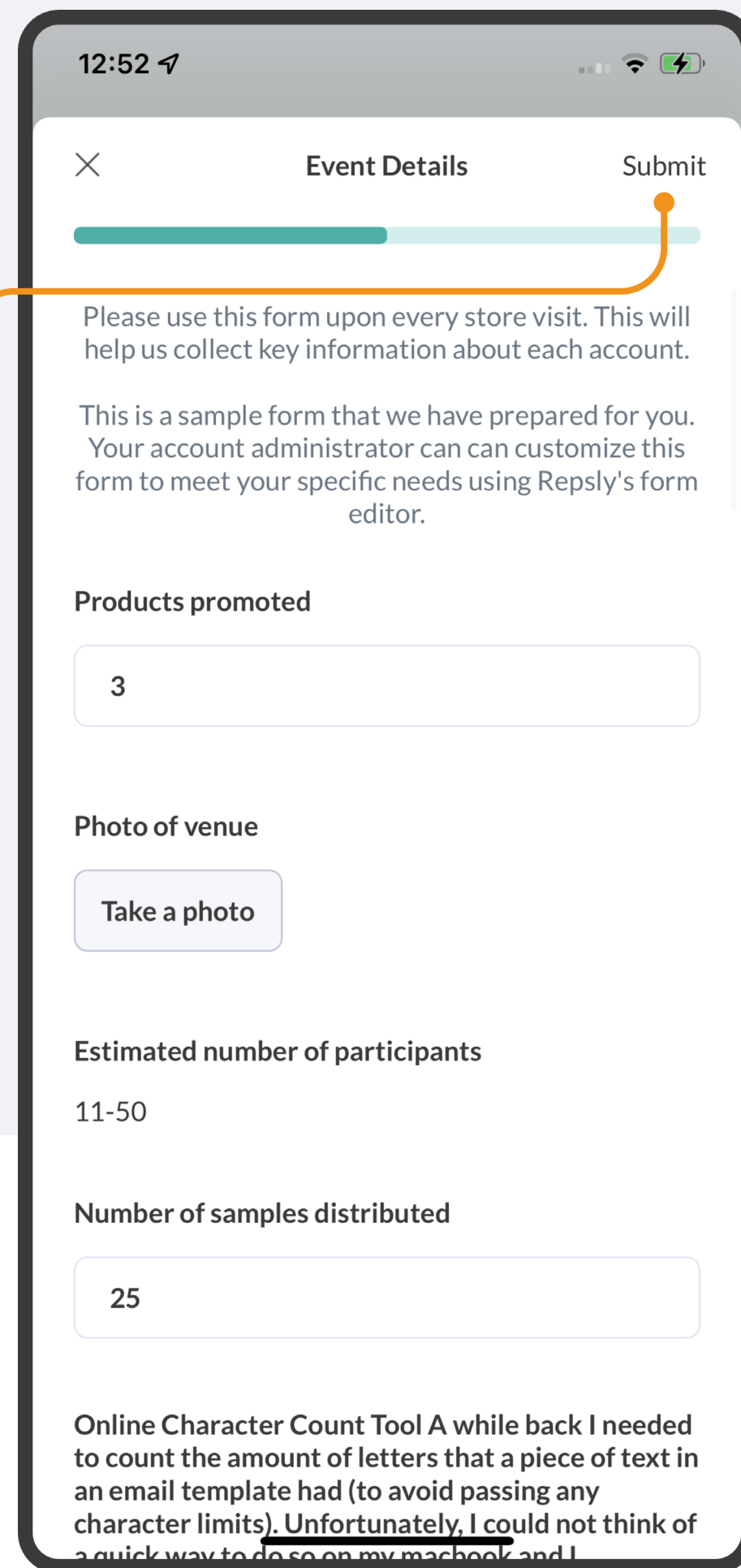
- 1 Choose the place for which you wish to fill out the form from your list of places.



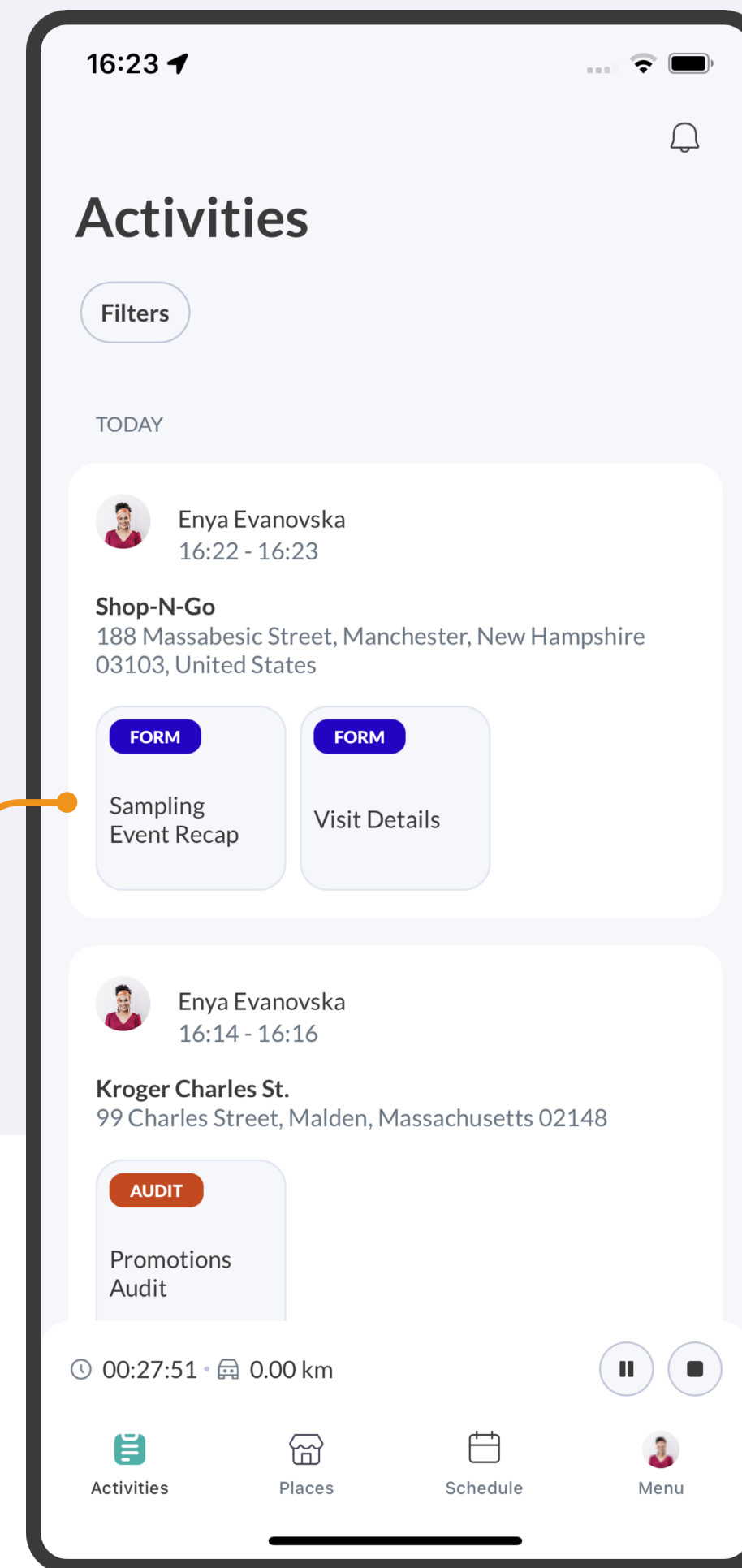
- 2 Tap on the **CHECK-IN** icon and select the **FORM option**.



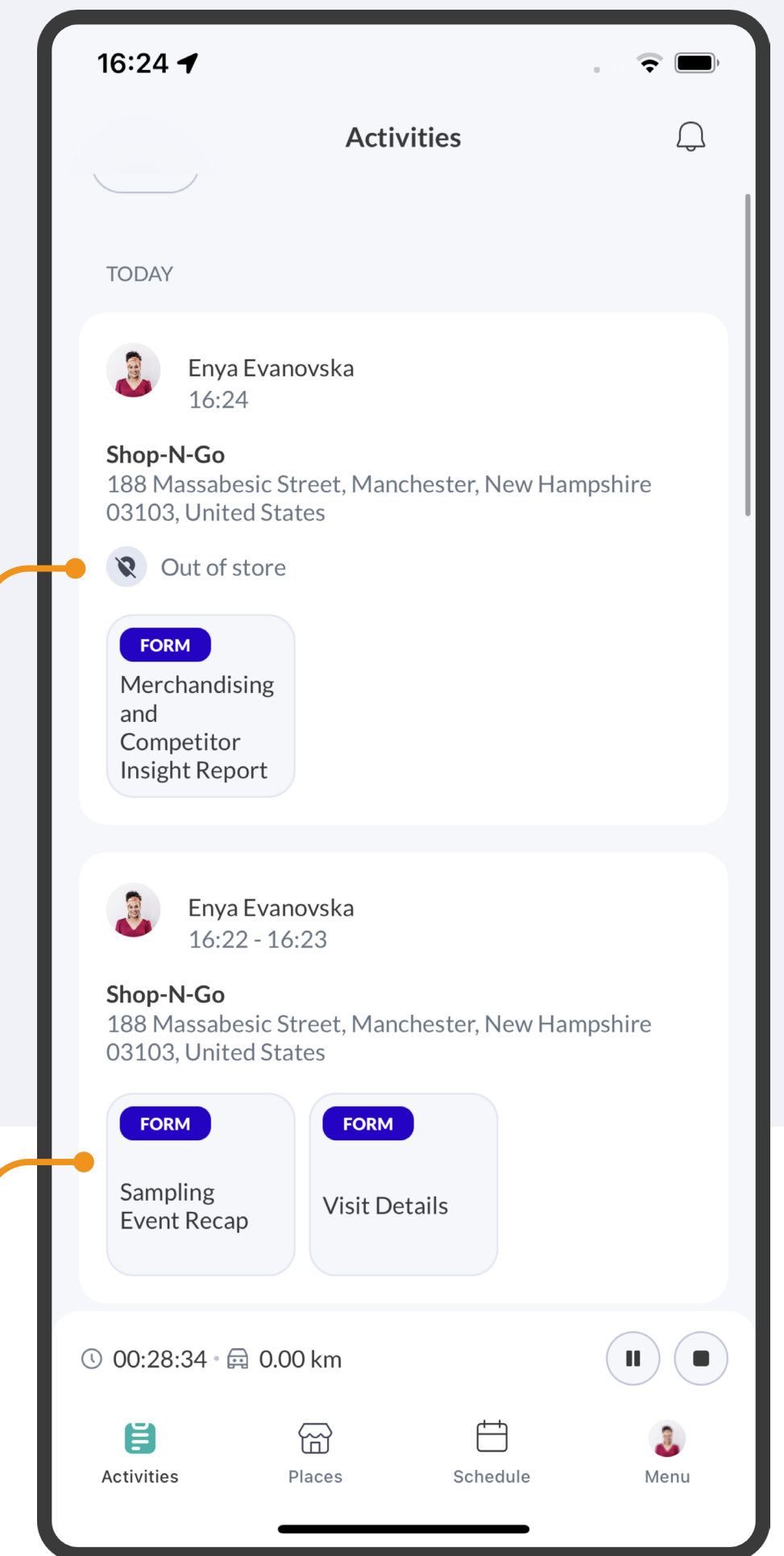
3 Choose the appropriate form.



4 Fill out all the necessary fields on the form. Tap **SUBMIT** when you're finished.



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

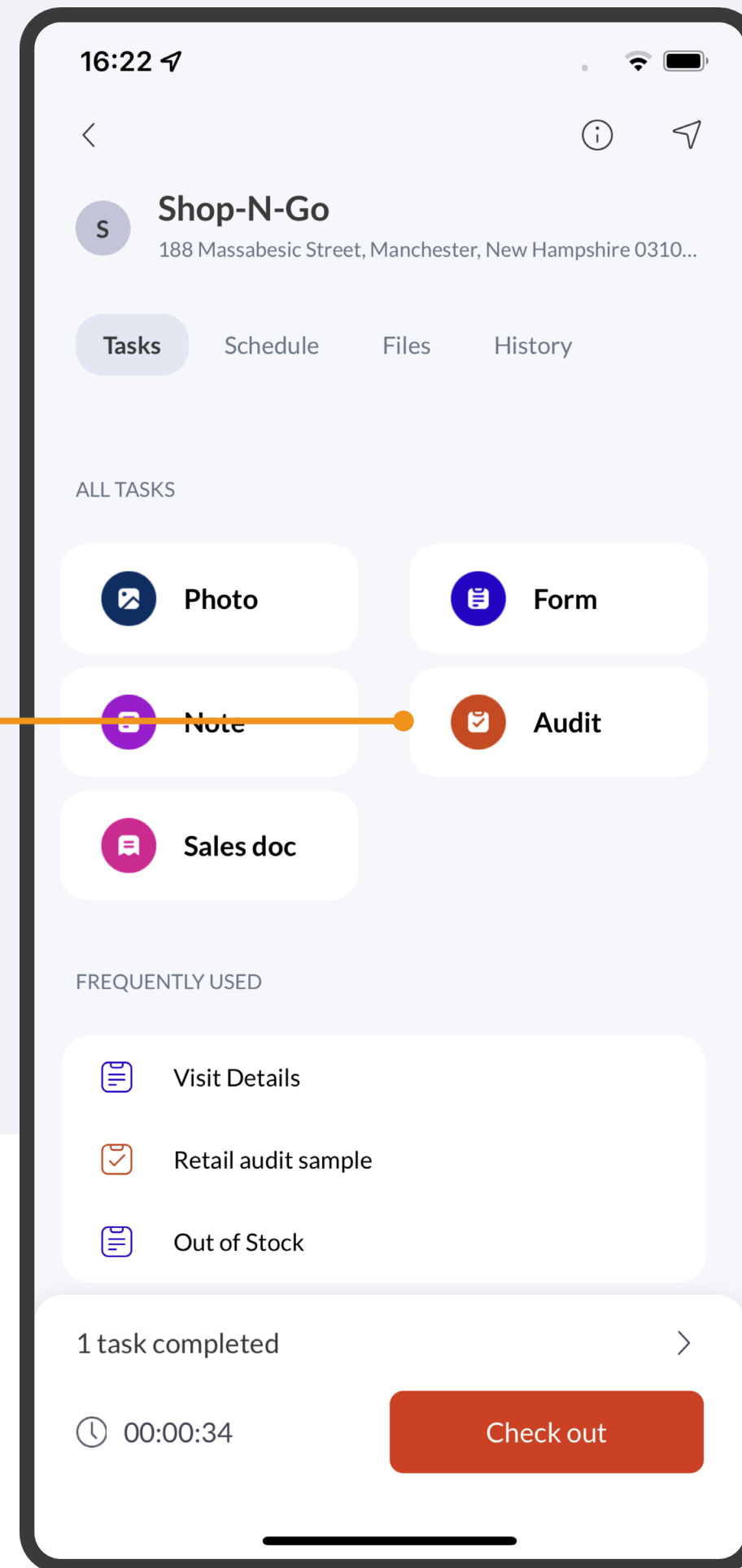


6 The **Out of store** indicator shows when Forms are submitted without checking in to the place.

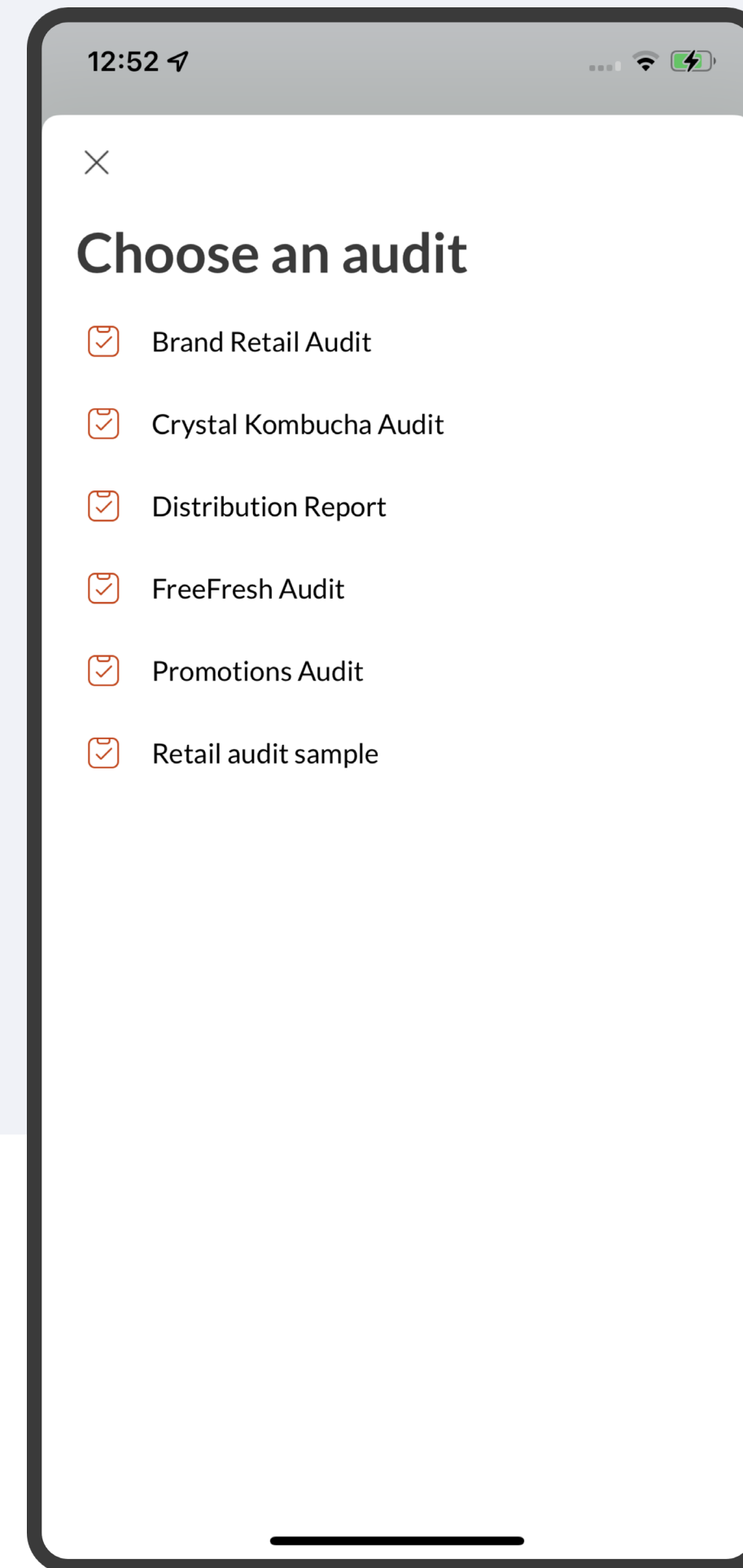
12

HOW TO FILL OUT A RETAIL AUDIT

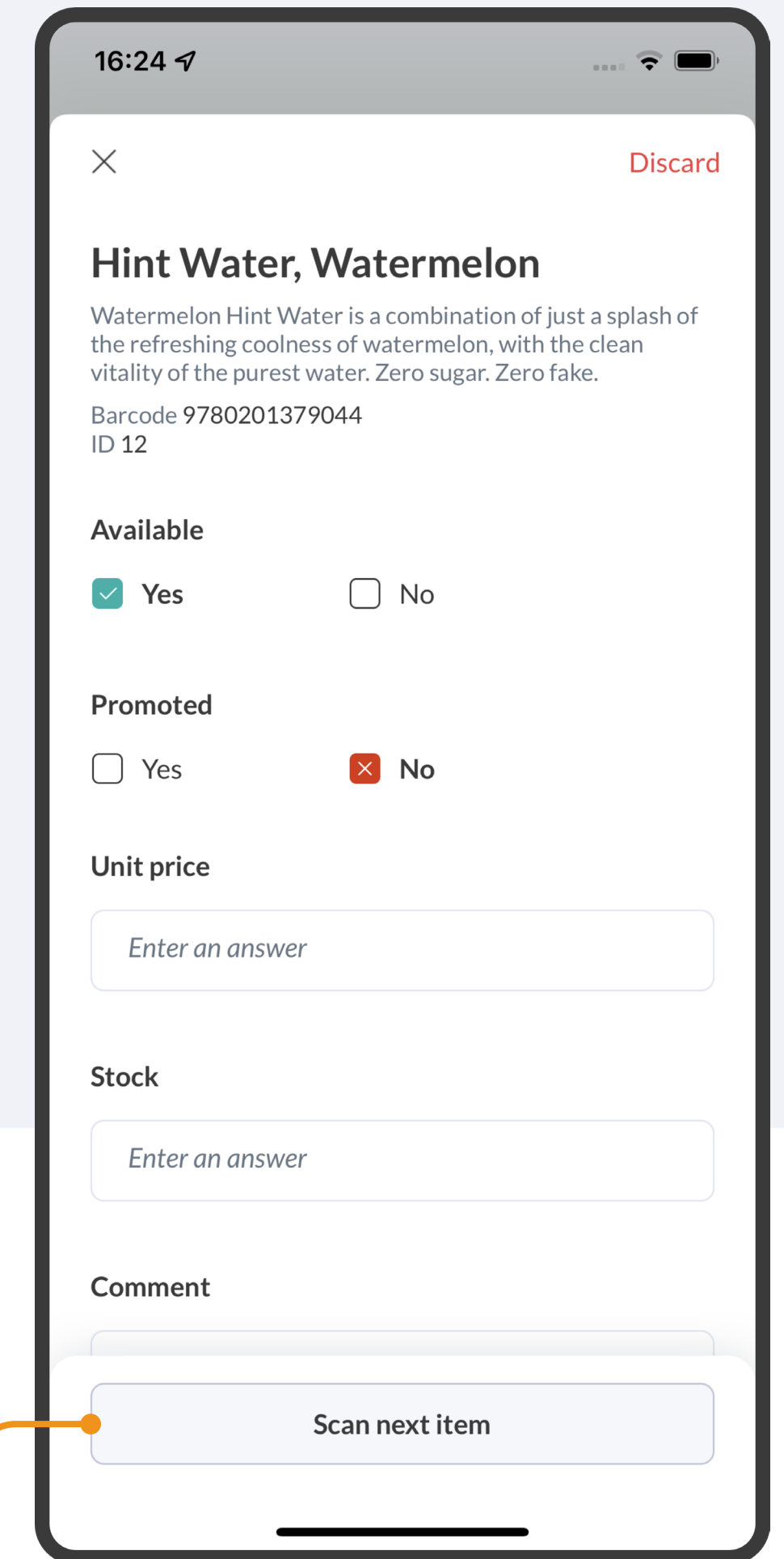
Retail Audits are surveys that allow you to capture real-time data on products and drive compliance at every visit.



1 Select **AUDIT** when checked into a place.



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

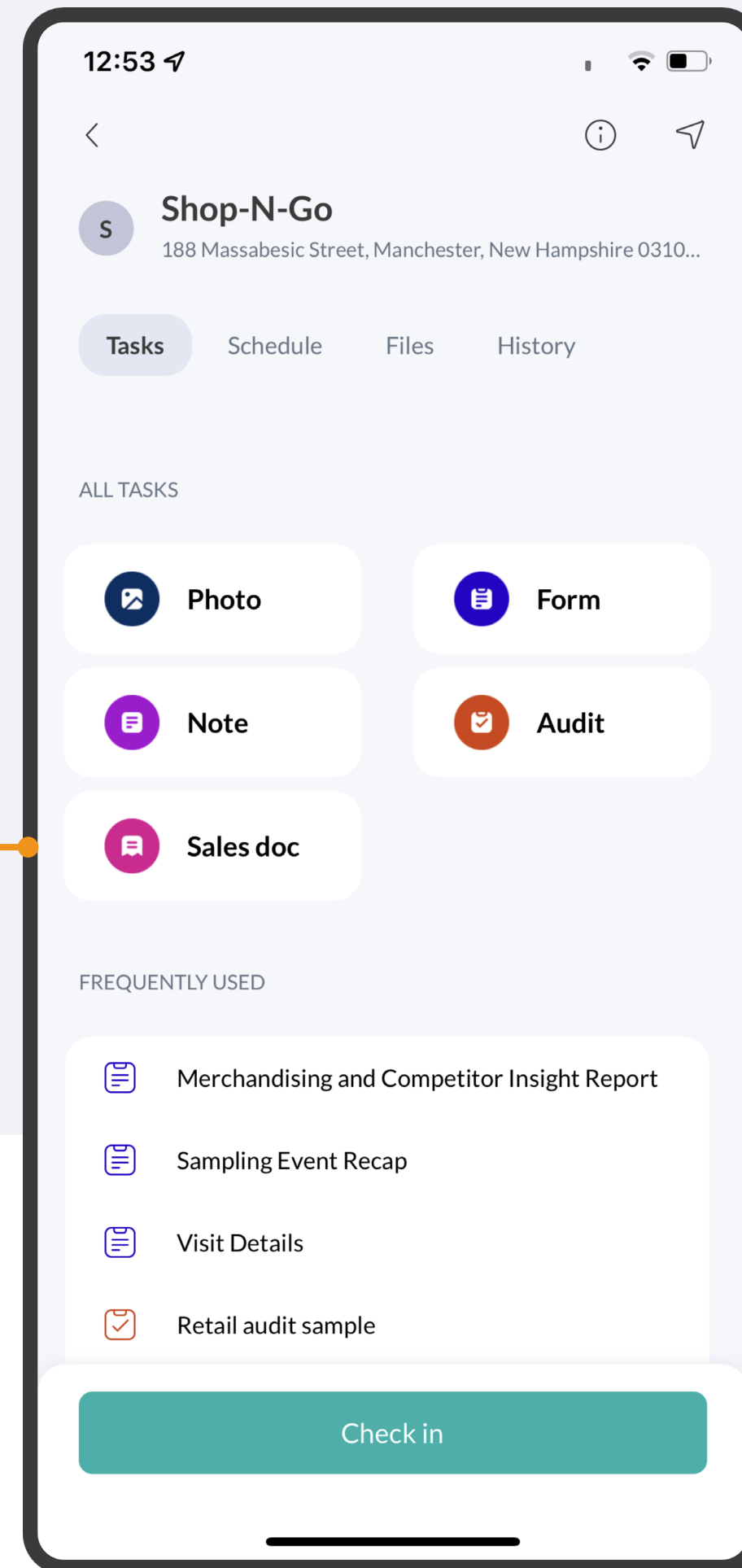


3 Complete the necessary fields, and tap **scan next item** to quickly move to the next product. Tap **SUBMIT** when you're finished.

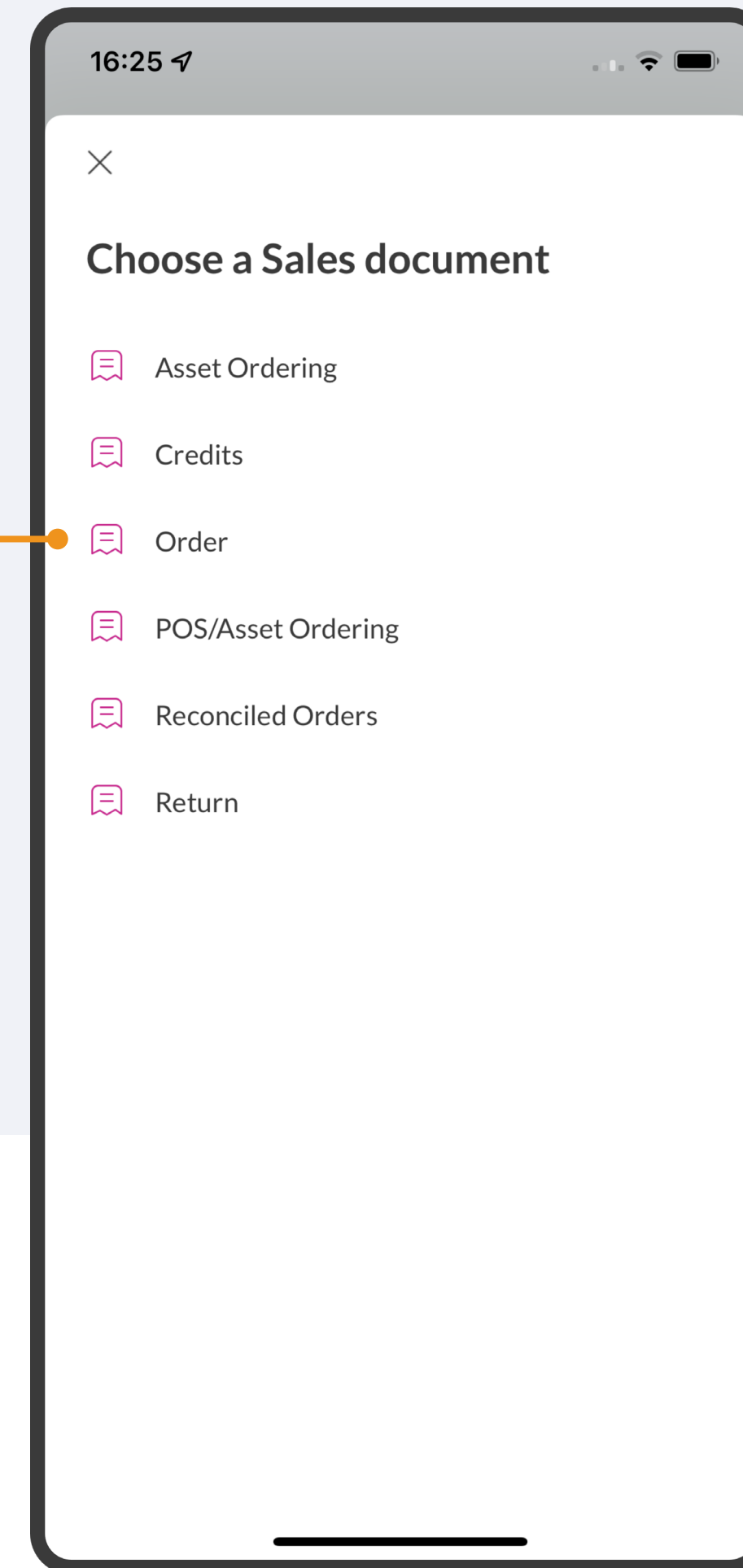
13

HOW TO PLACE AN ORDER

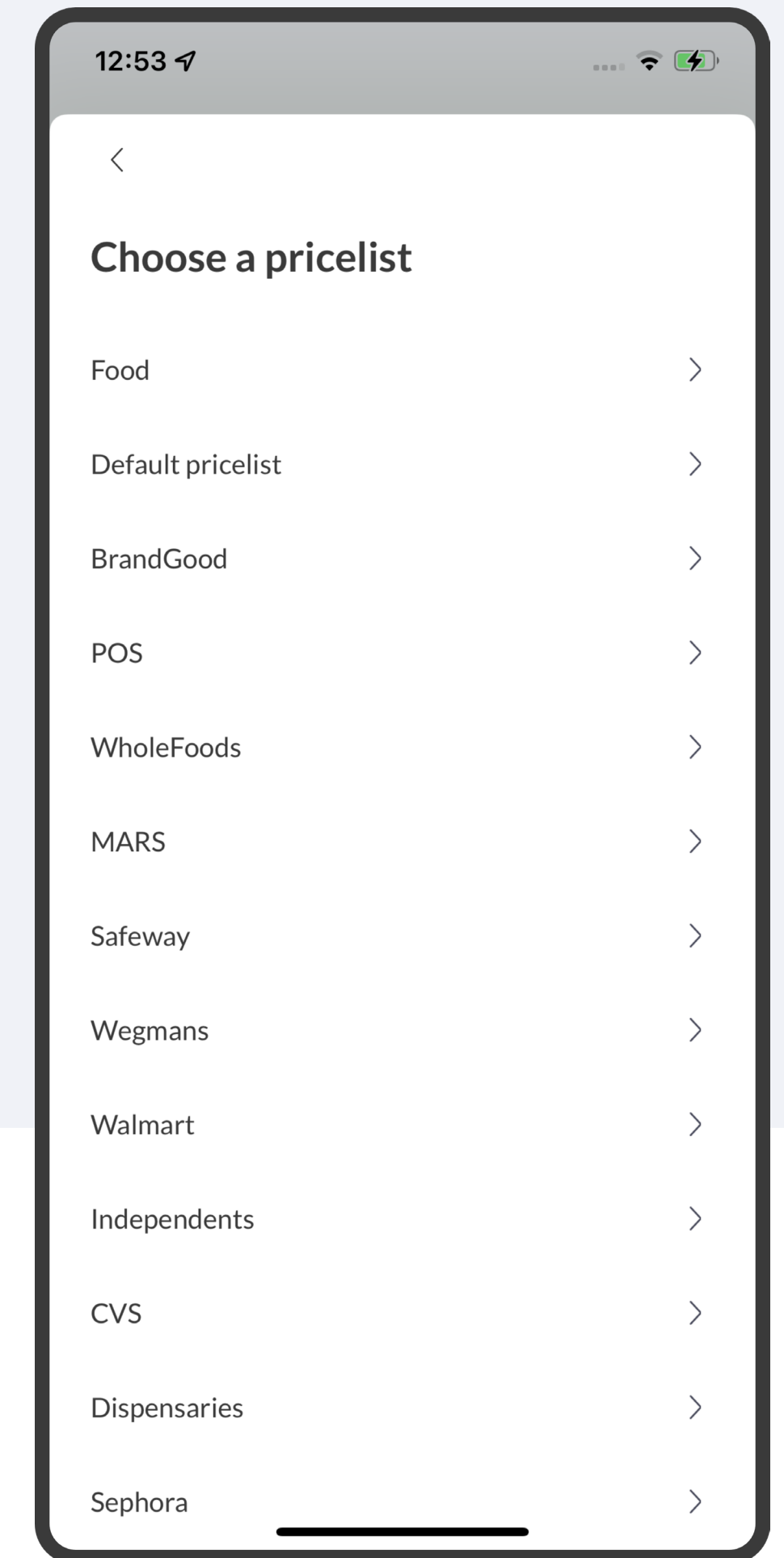
Sales Documents make it easy to complete fast, accurate purchase orders right from the store.

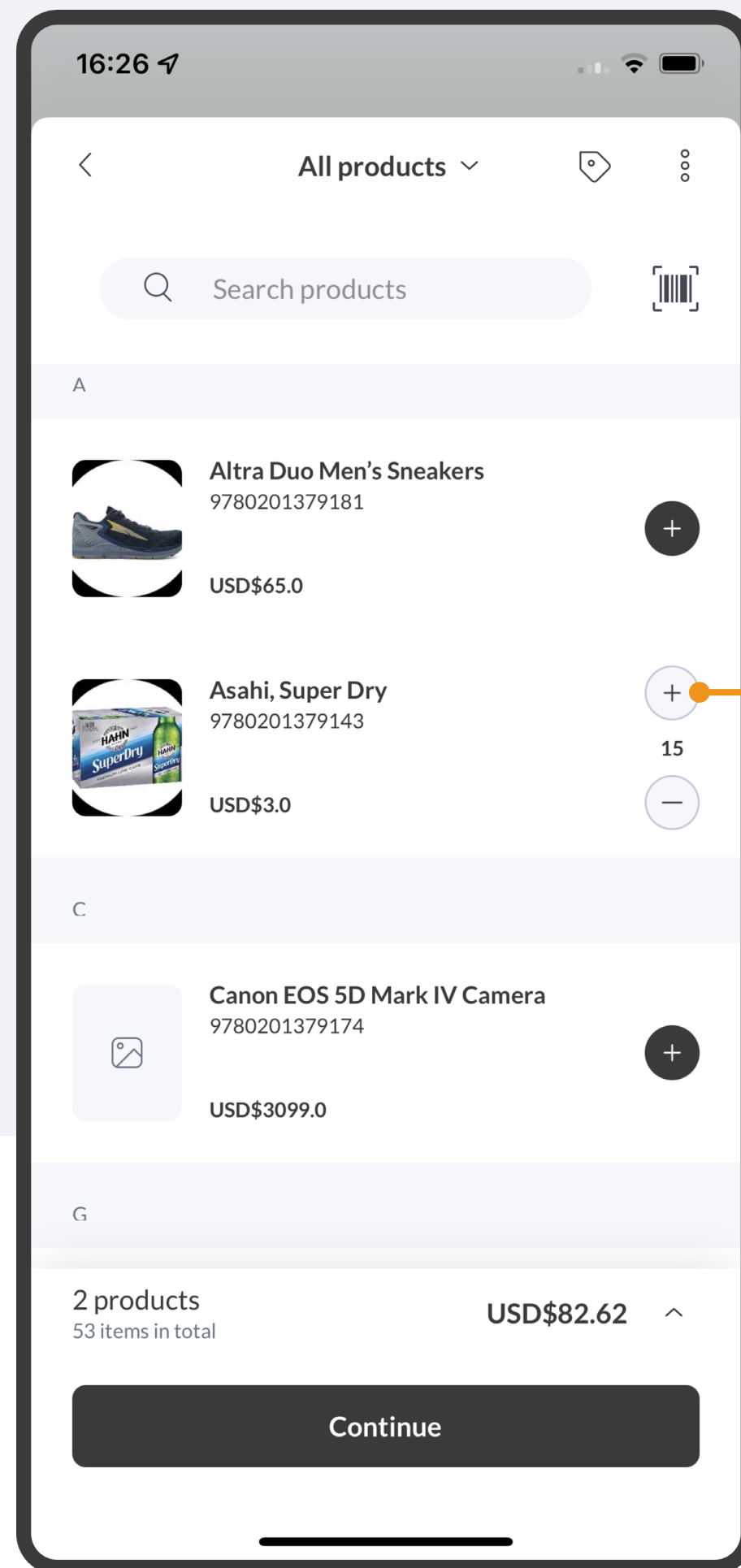


1 Once you've checked into a place, tap **SALES DOC** to get started with your order.

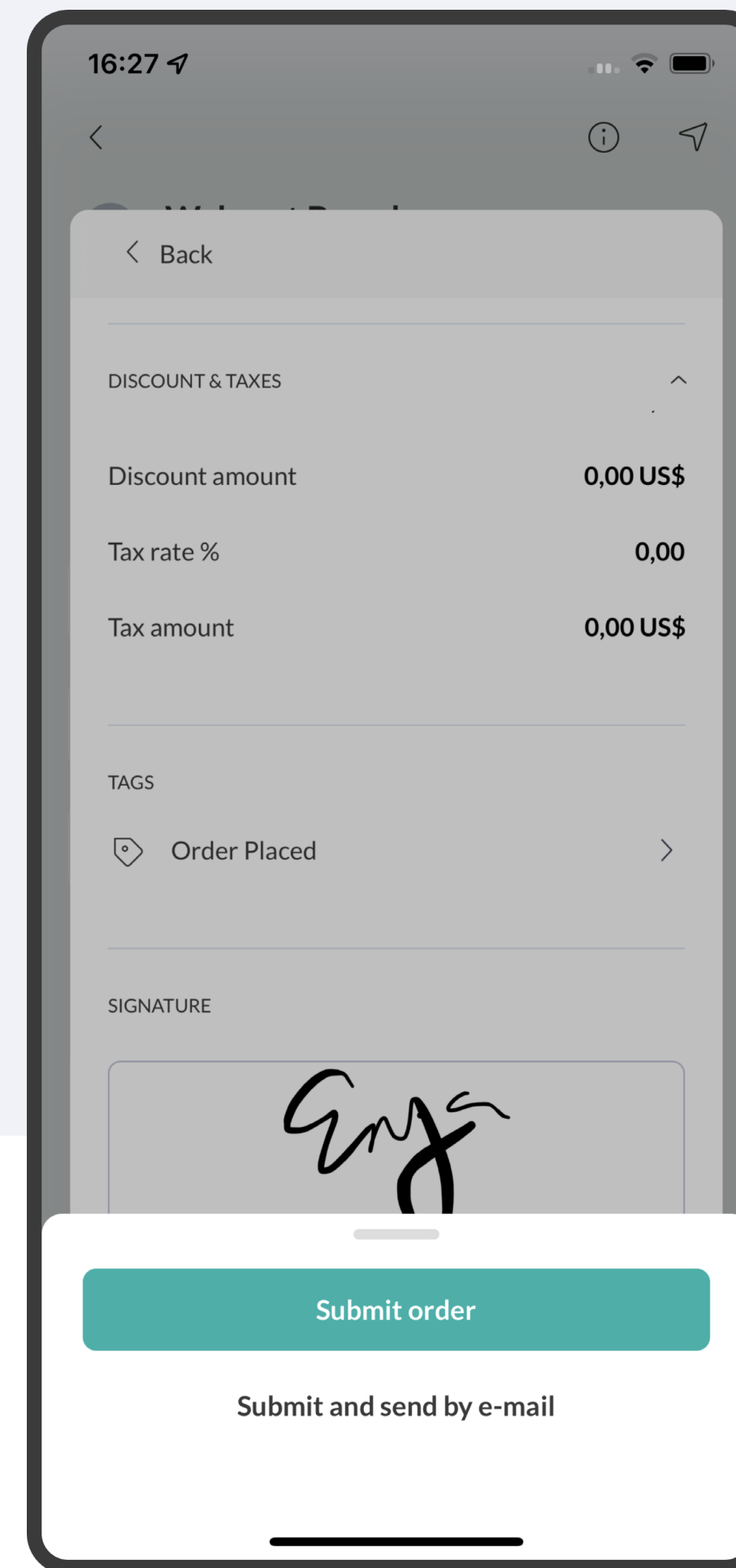


2 Tap on the appropriate **ORDER** and select a price list to view a list of products. You can search for products, scan their barcode, or manually search for their SKU. Tap on the product name to view more details, like image, last order date, and more.

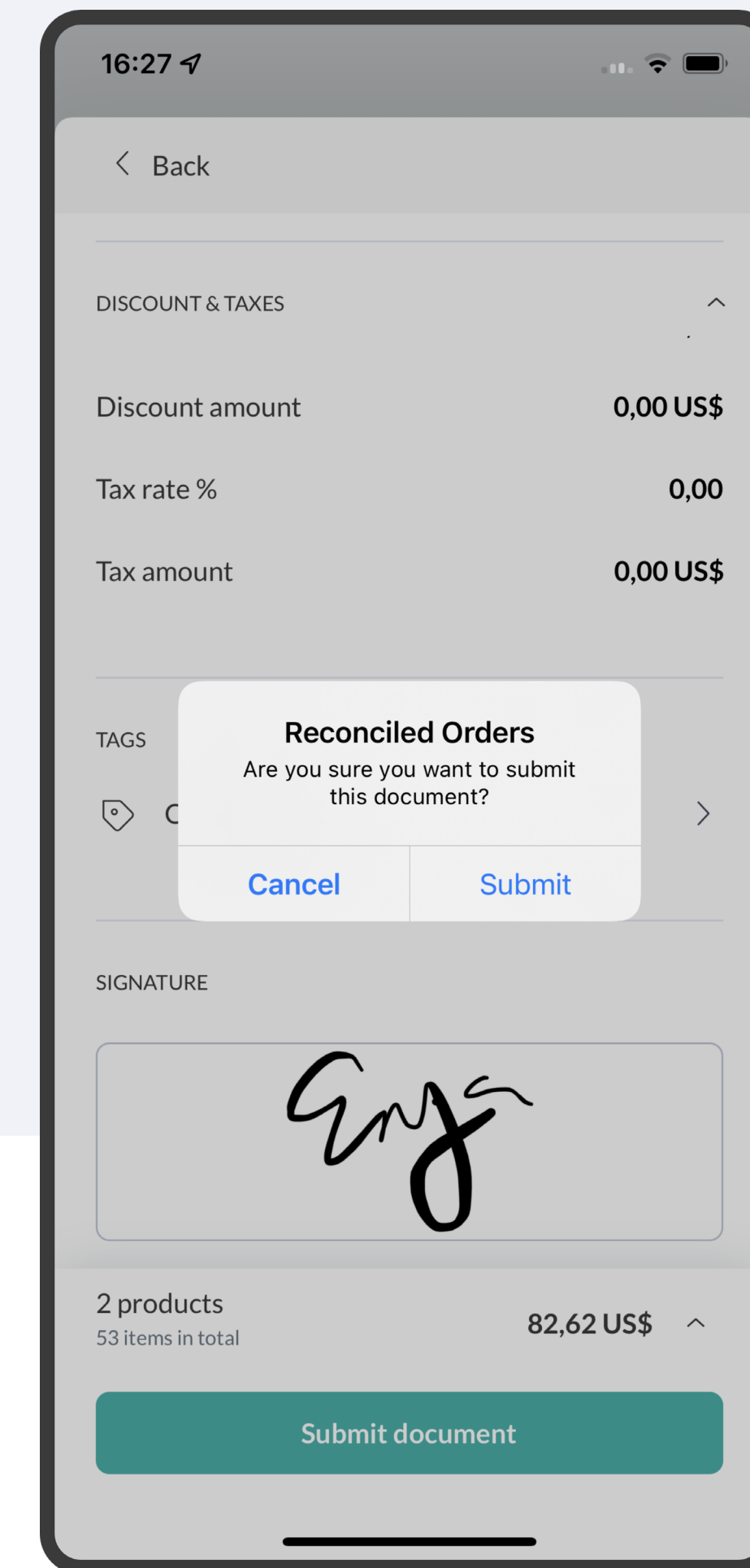




3 To add products to your order, tap on the **+ BUTTON** to add that product to your cart.



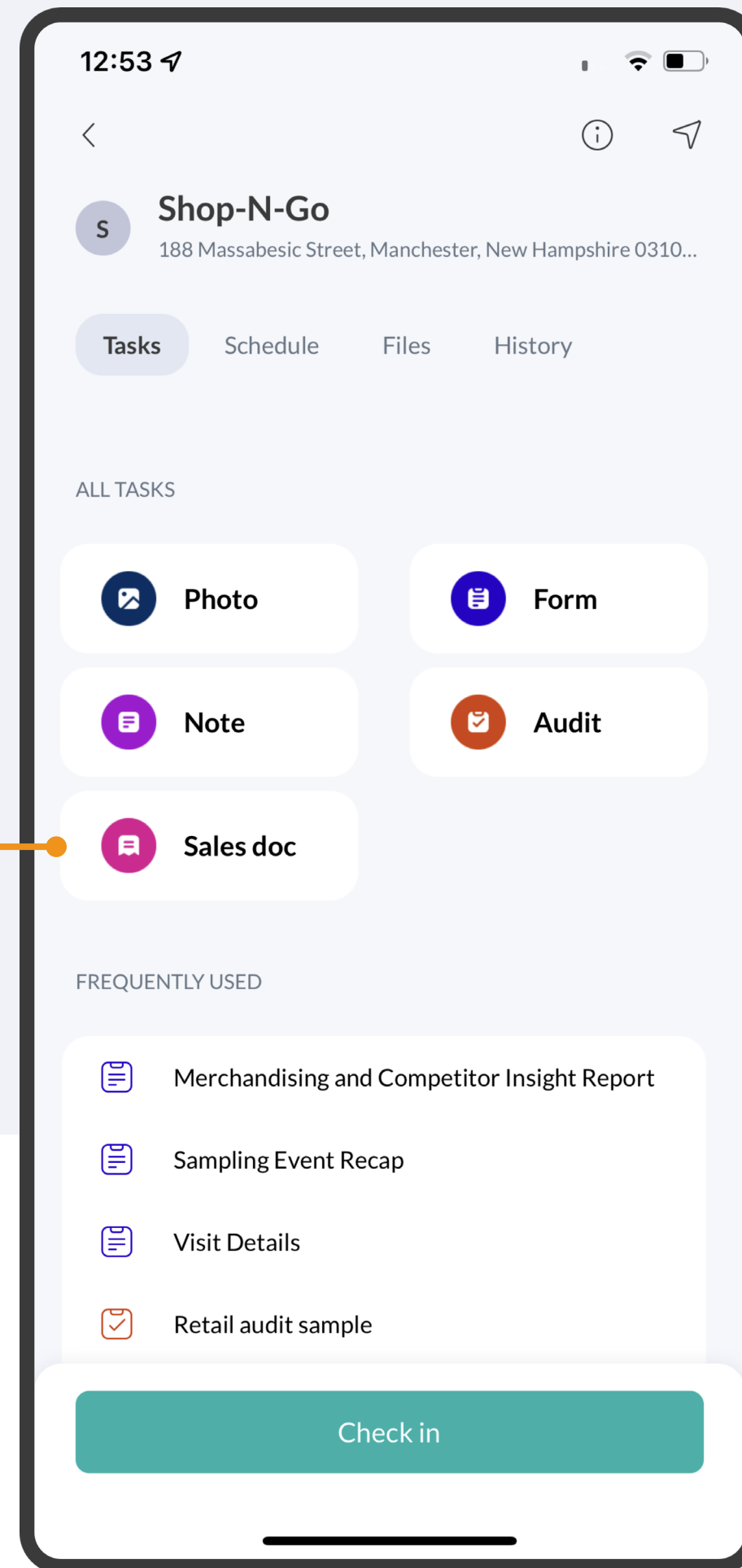
4 Once you have added all items to your cart, you'll be prompted to confirm a few details before submitting your order.



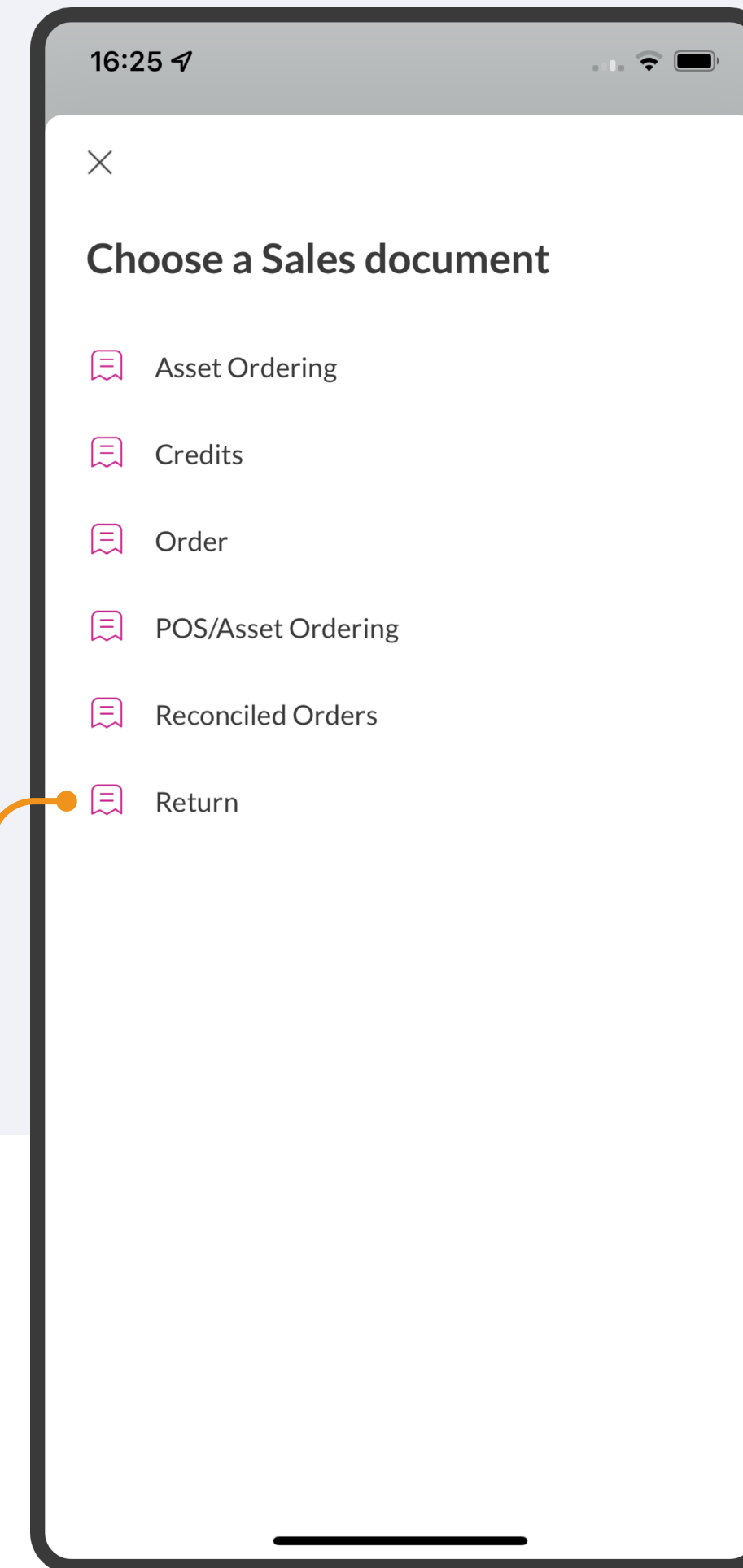
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HOW TO PLACE RETURN

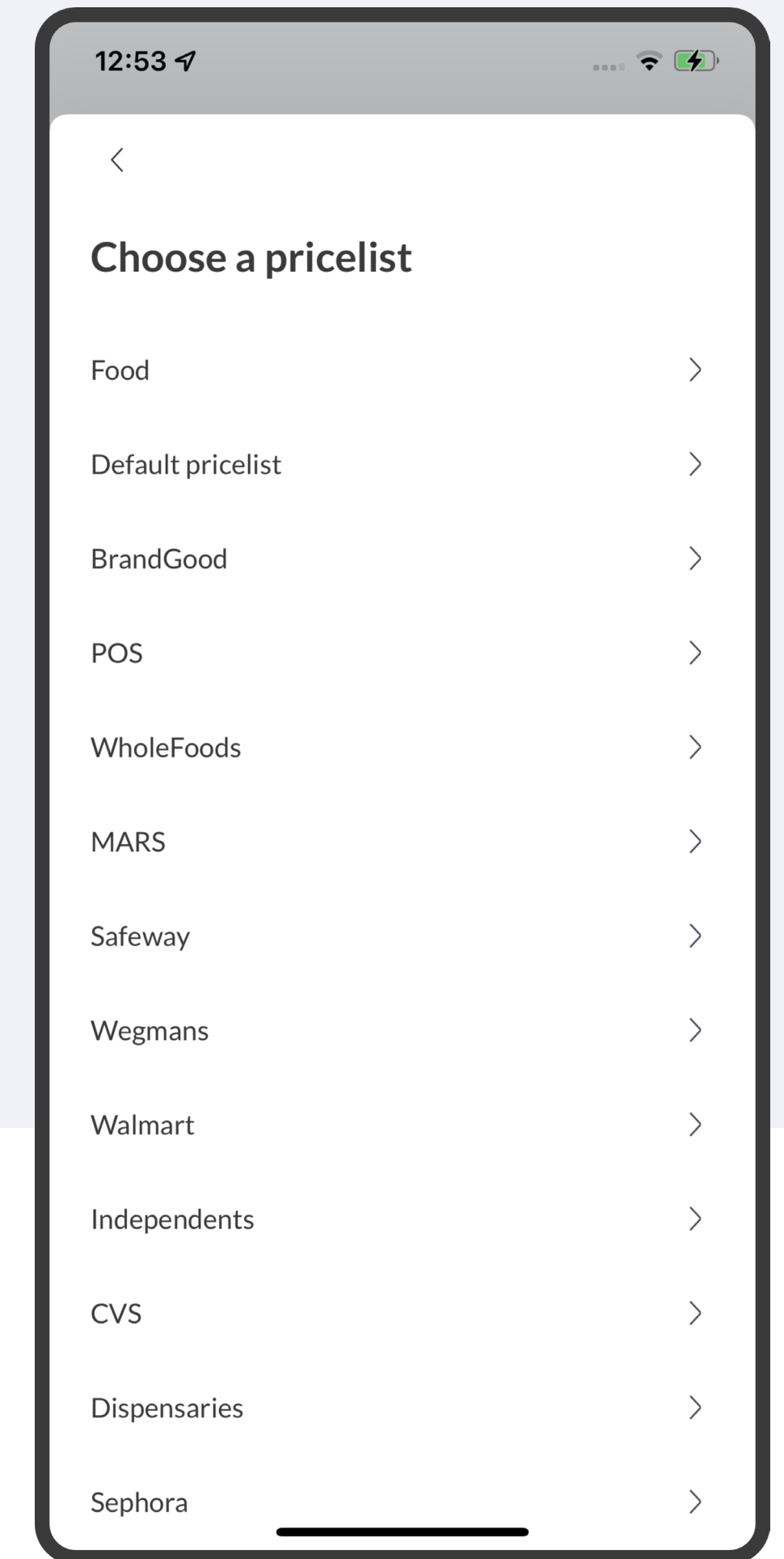
Some teams also need to accept returns in the store. This workflow is very similar to the process for placing a new order.

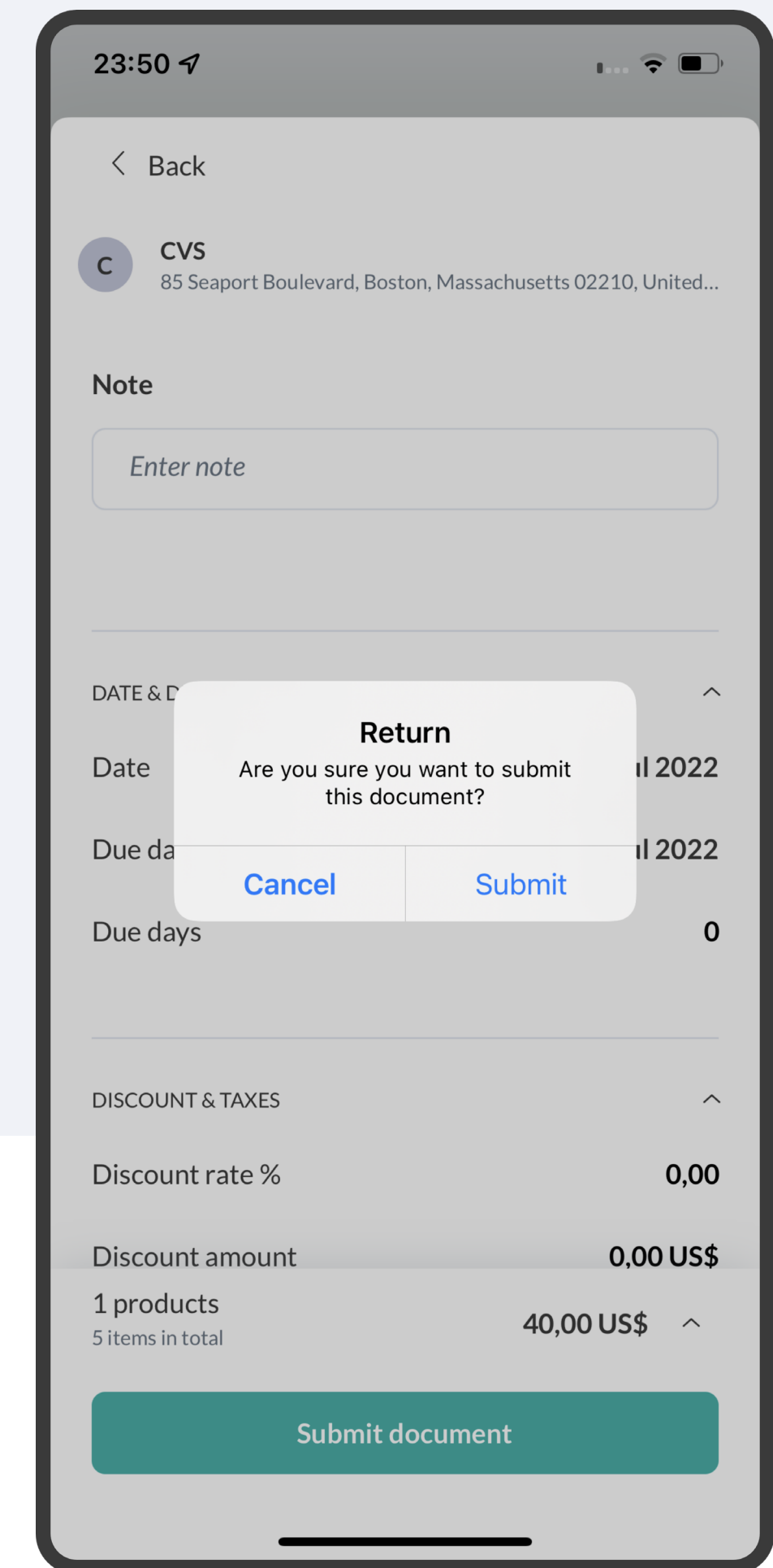
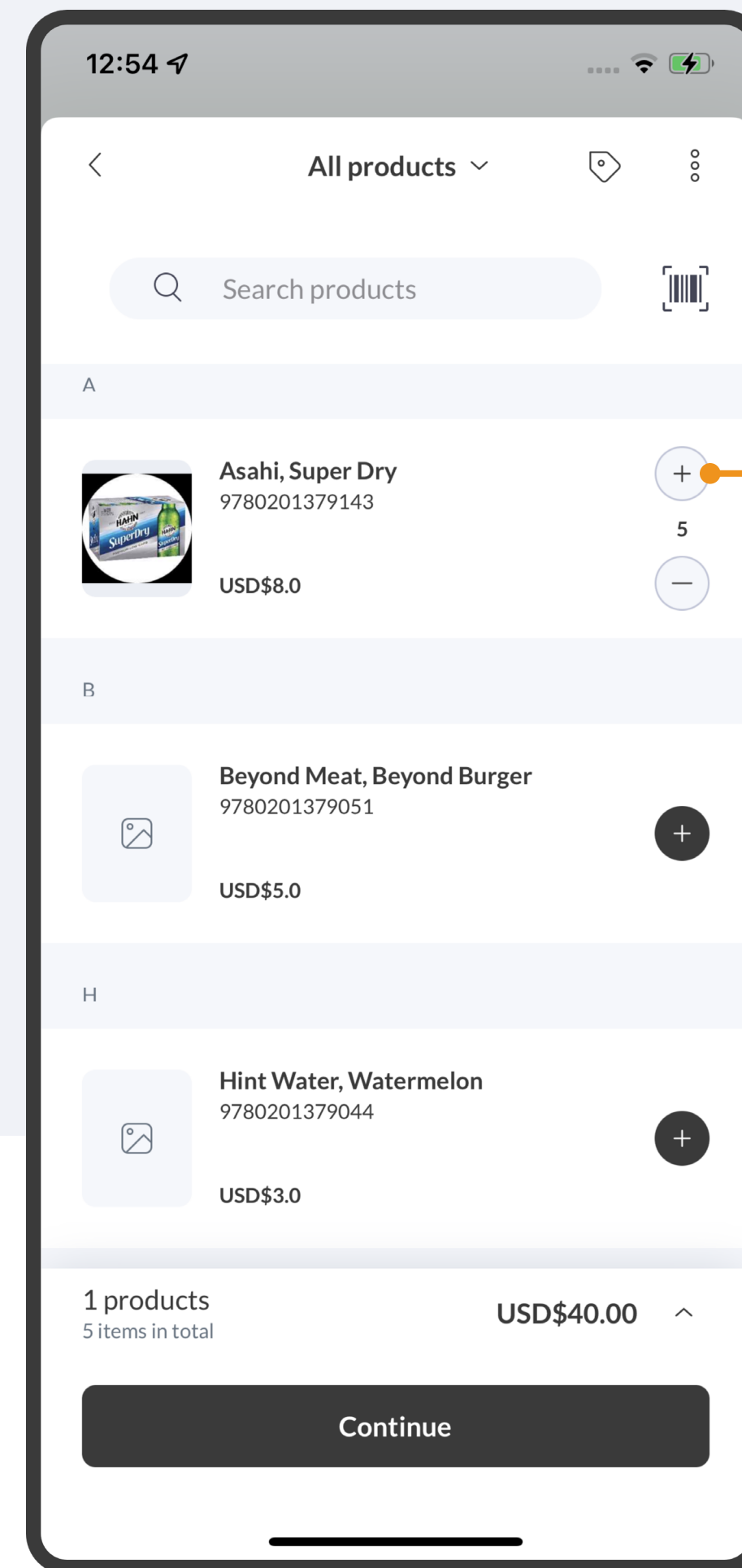
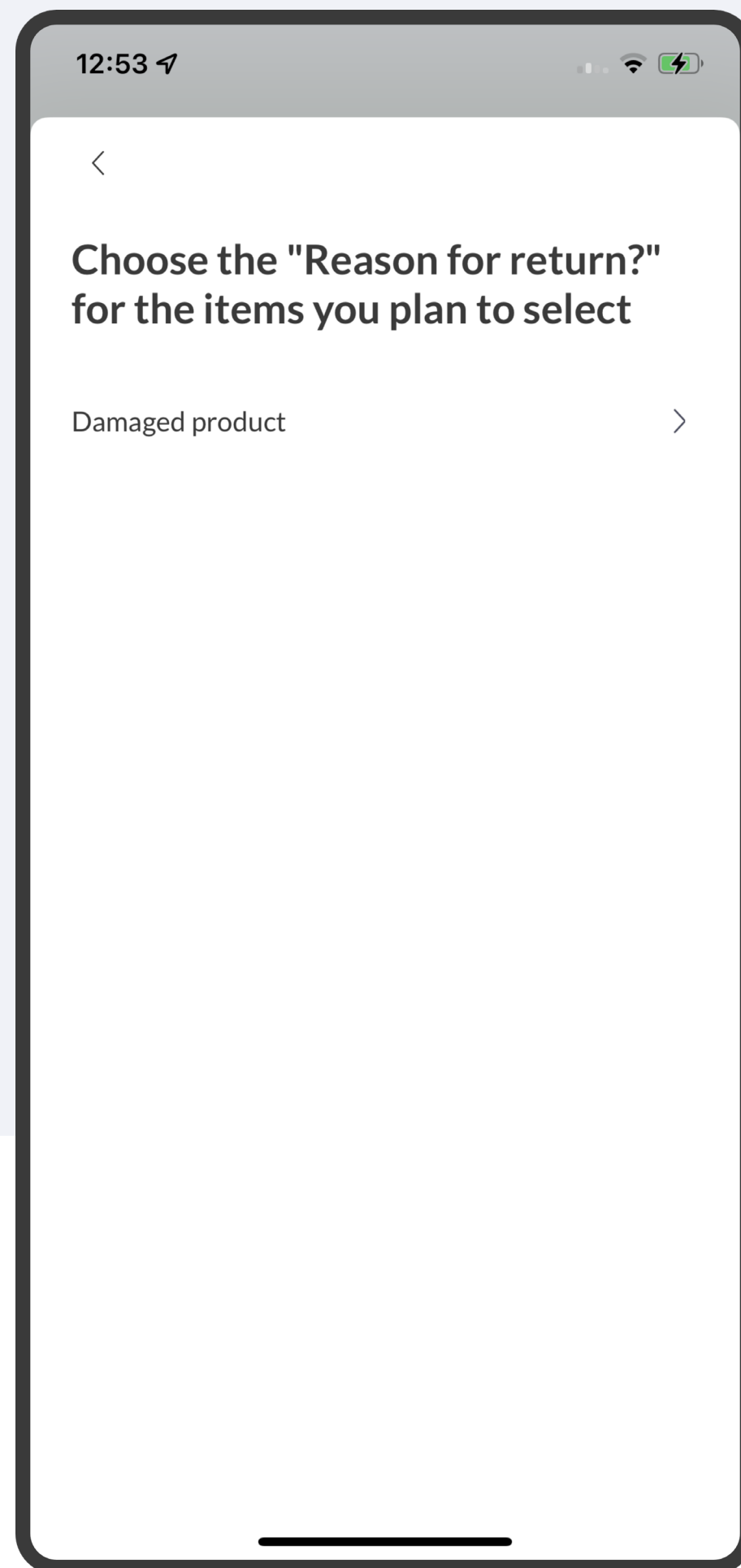
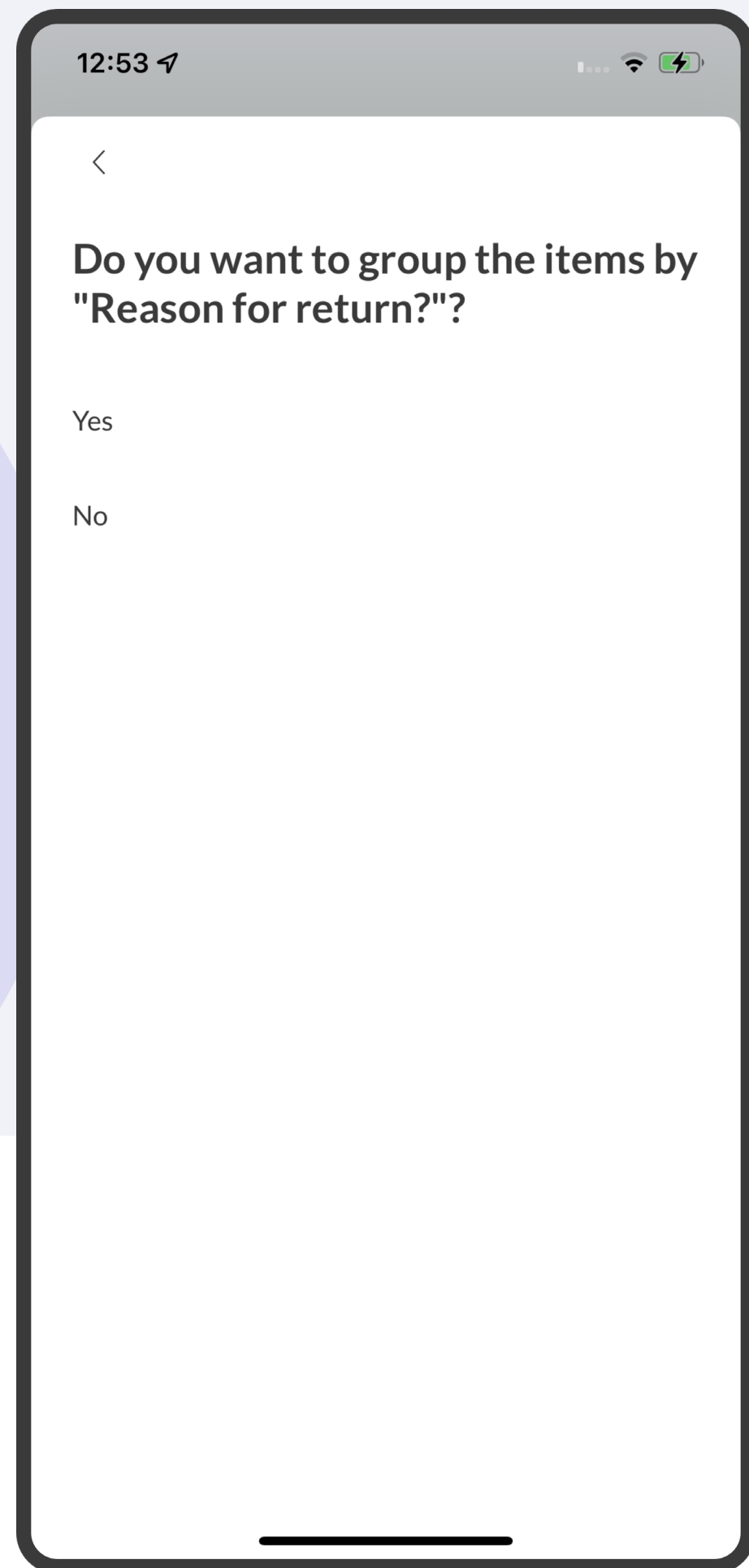


1 Tap the **PLACES** tab and select the place. After checking in, tap on the **SALES DOCUMENT** tab.



2 Tap on the appropriate **RETURN** and select a pricelist.





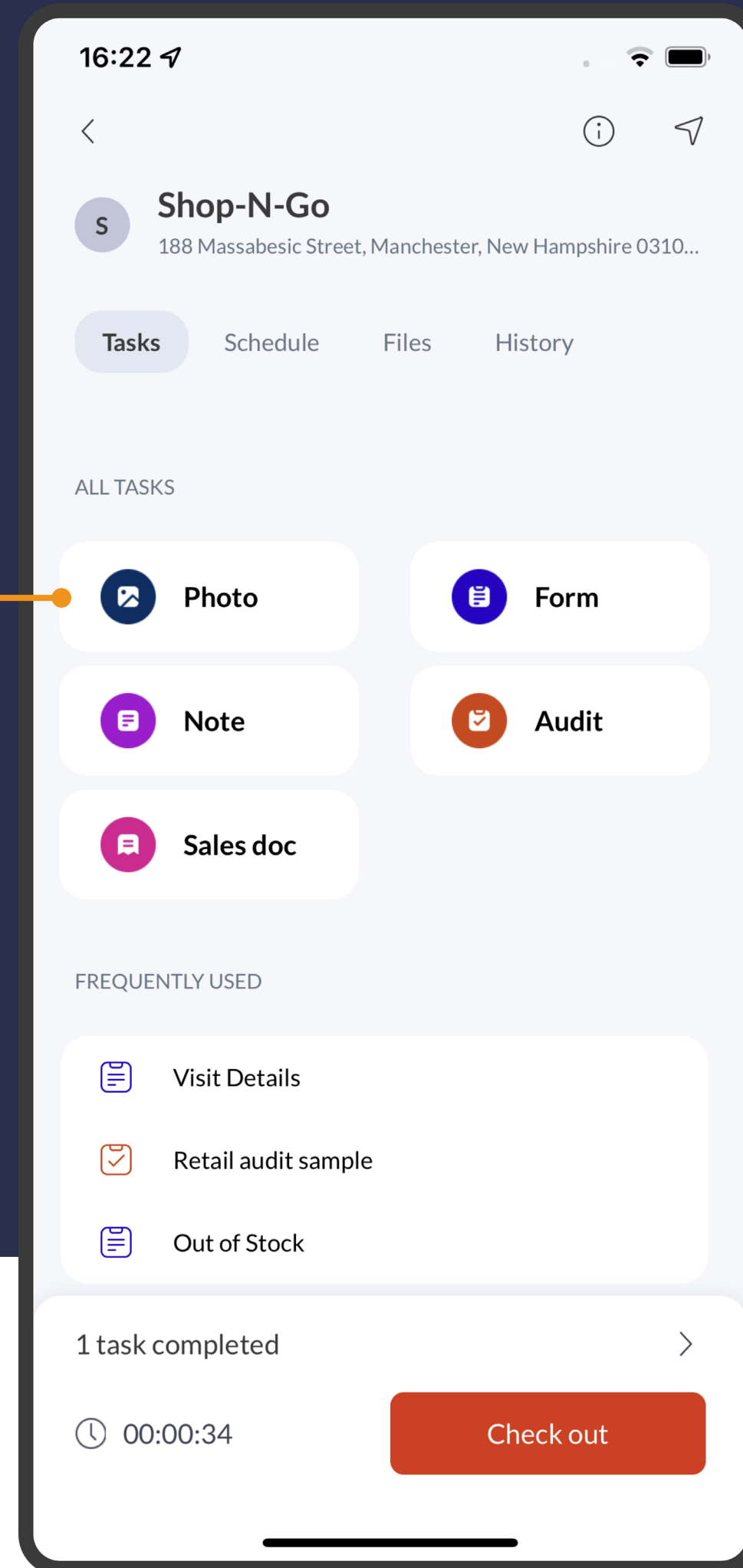
3 Now choose if you want to group the items by Reason for return. If you click **YES**, you'll be prompted to select from a list of suggested reasons.

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

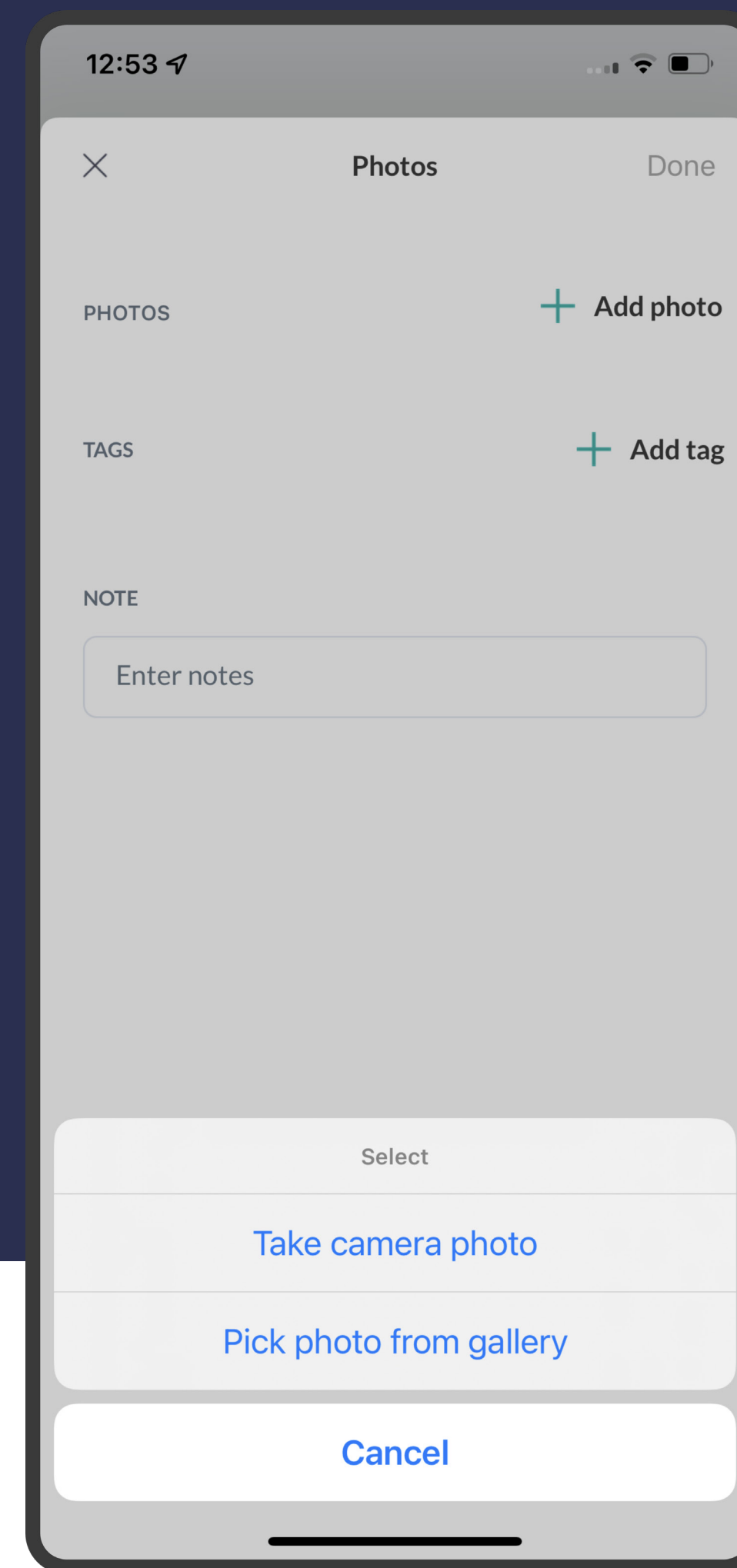
5 Once you have added all items to your cart, you'll be prompted to confirm a few details before submitting your return.

15 HOW TO TAKE A PHOTO

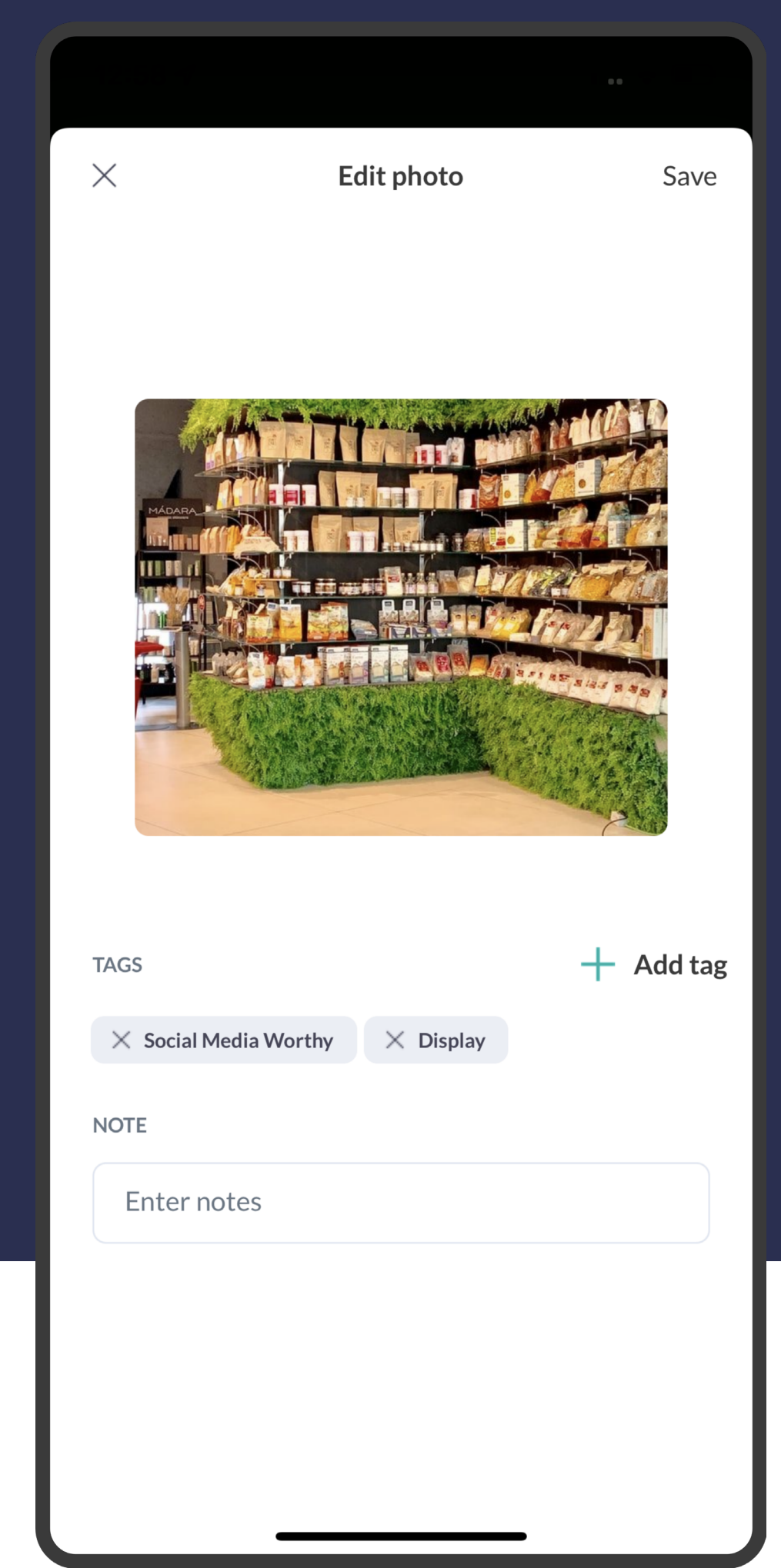
Capture photos, tag, and share them directly from the field for immediate visibility into your accounts.



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



2 You can either take a photo with your device's camera or upload a photo from your gallery.



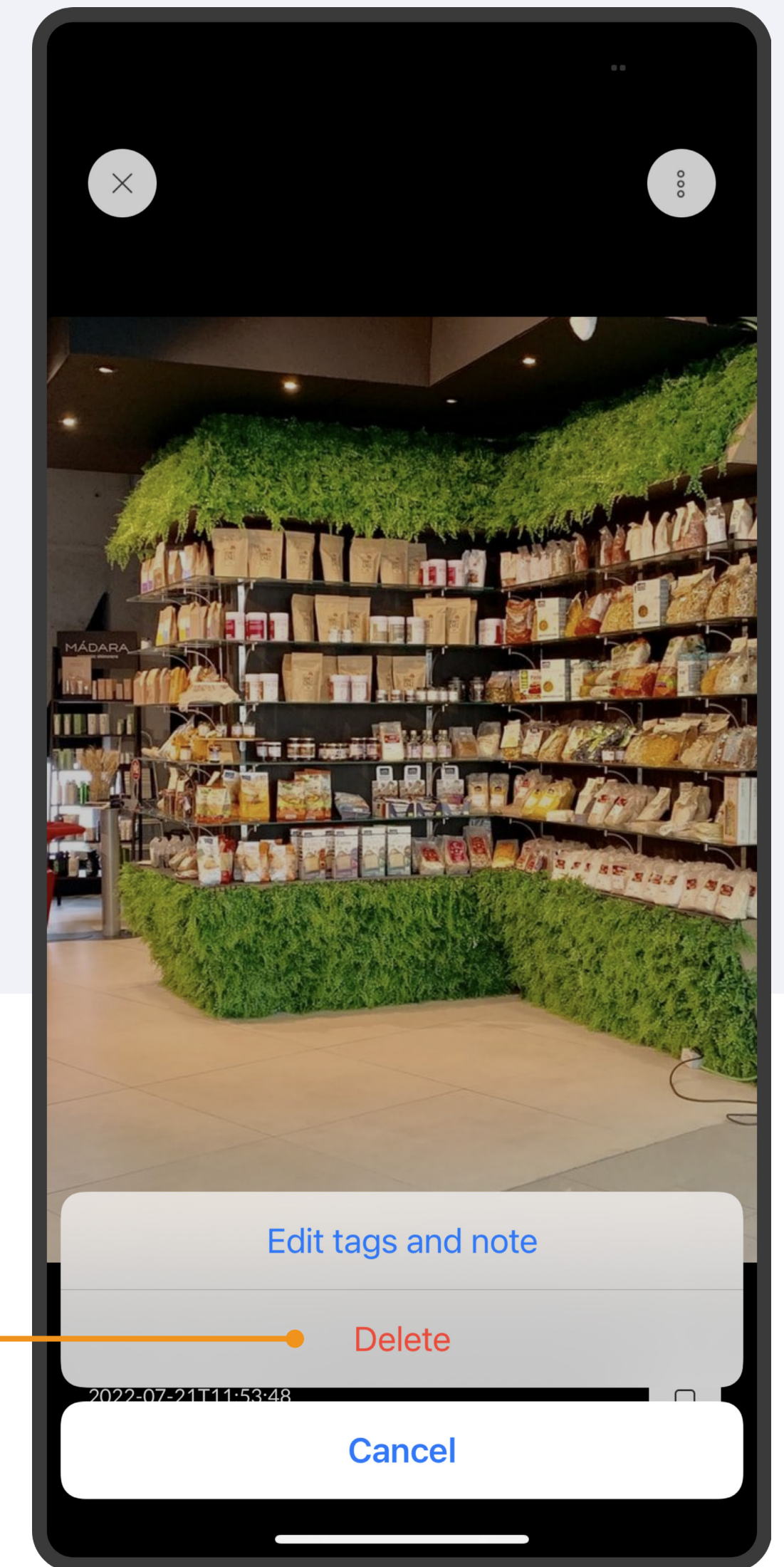
3 Tap the **SAVE** button to submit the photos.

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HOW TO DELETE A PHOTO

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

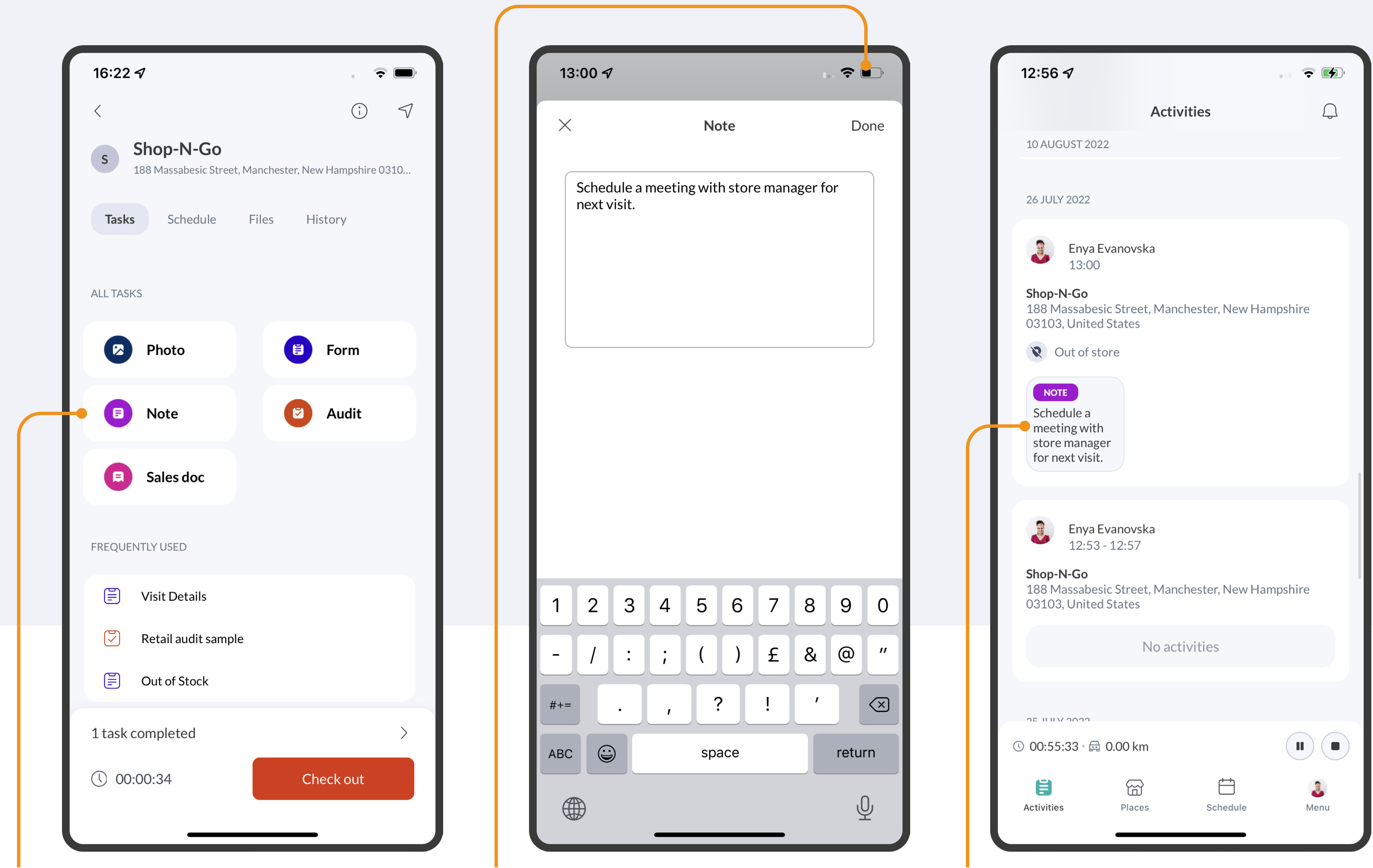
- 1 Open the photo you want to delete and click on the **THREE DOTS** in the bottom right corner.
- 2 Click on **DELETE** to confirm your action and your photo will be deleted.



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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 **DONE** to save.

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

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HOW TO ADD OR EDIT PHOTO TAGS AND NOTES

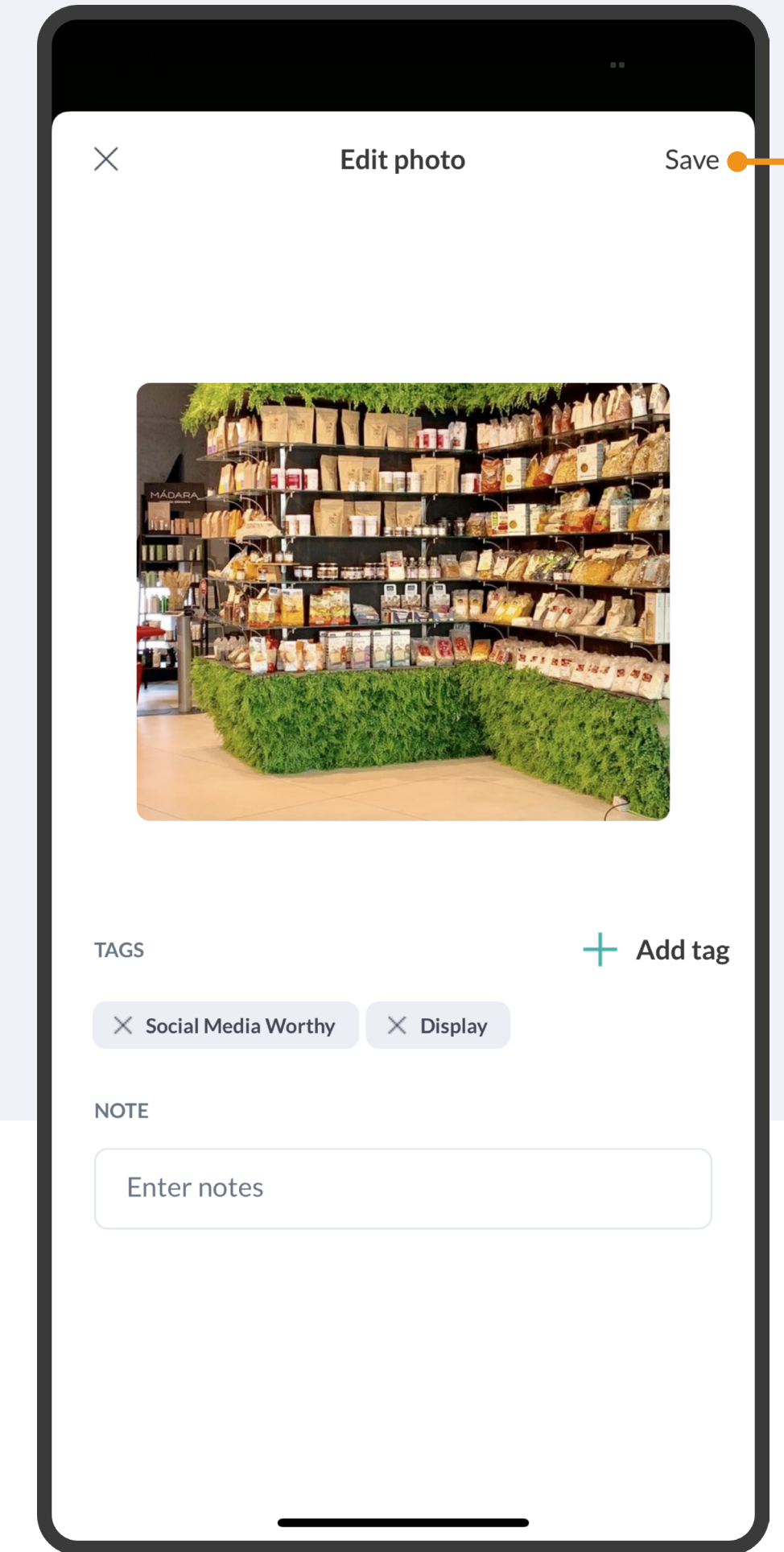
You can add notes or tags to photos while out in the field, or even after the photo is submitted to Repsly. Tagging helps your team filter through submitted photos and find what they need.



- 1 Open the photo you want to edit and click on the **THREE DOTS** in the bottom right corner.



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

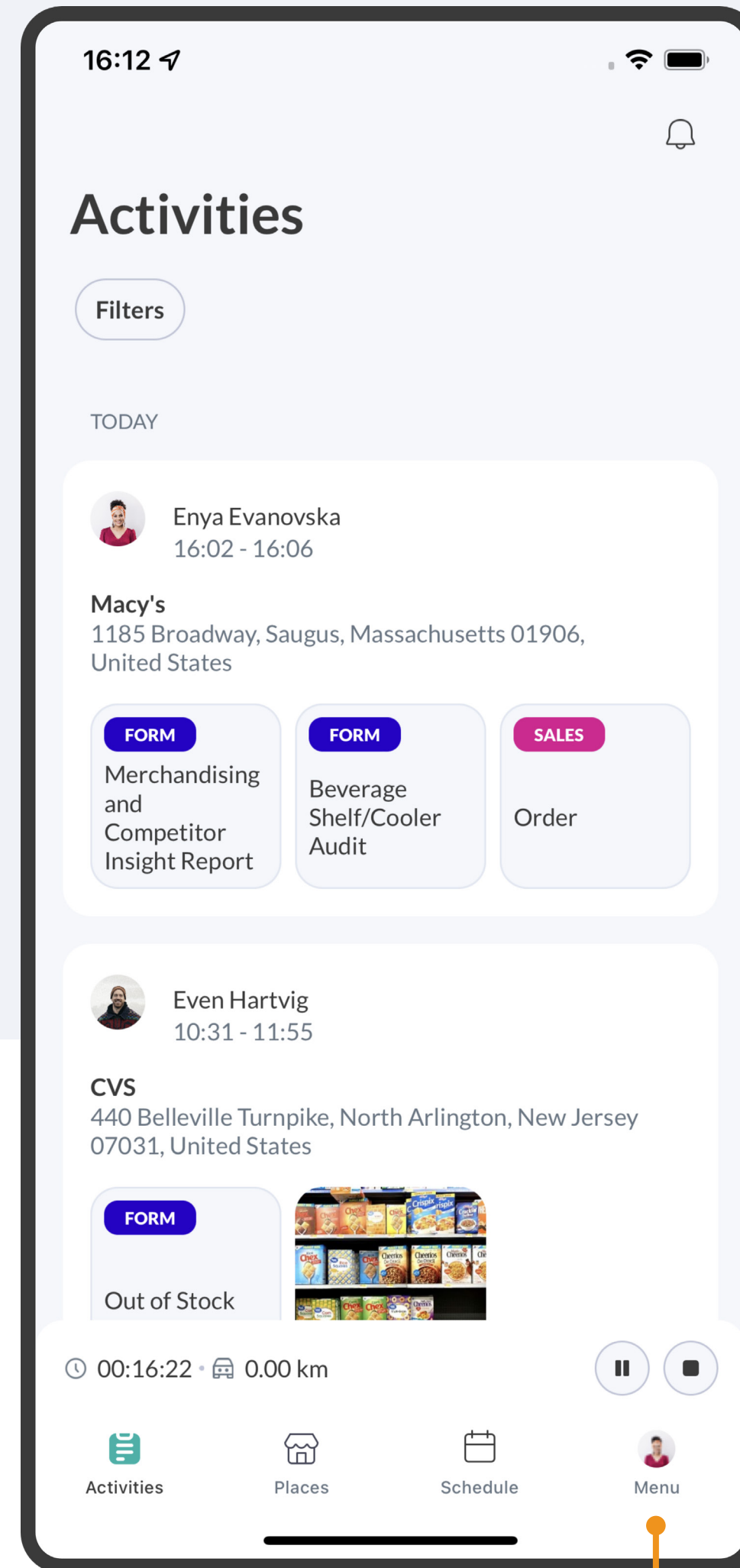


- 3 Once you're done, tap on the **SAVE**.

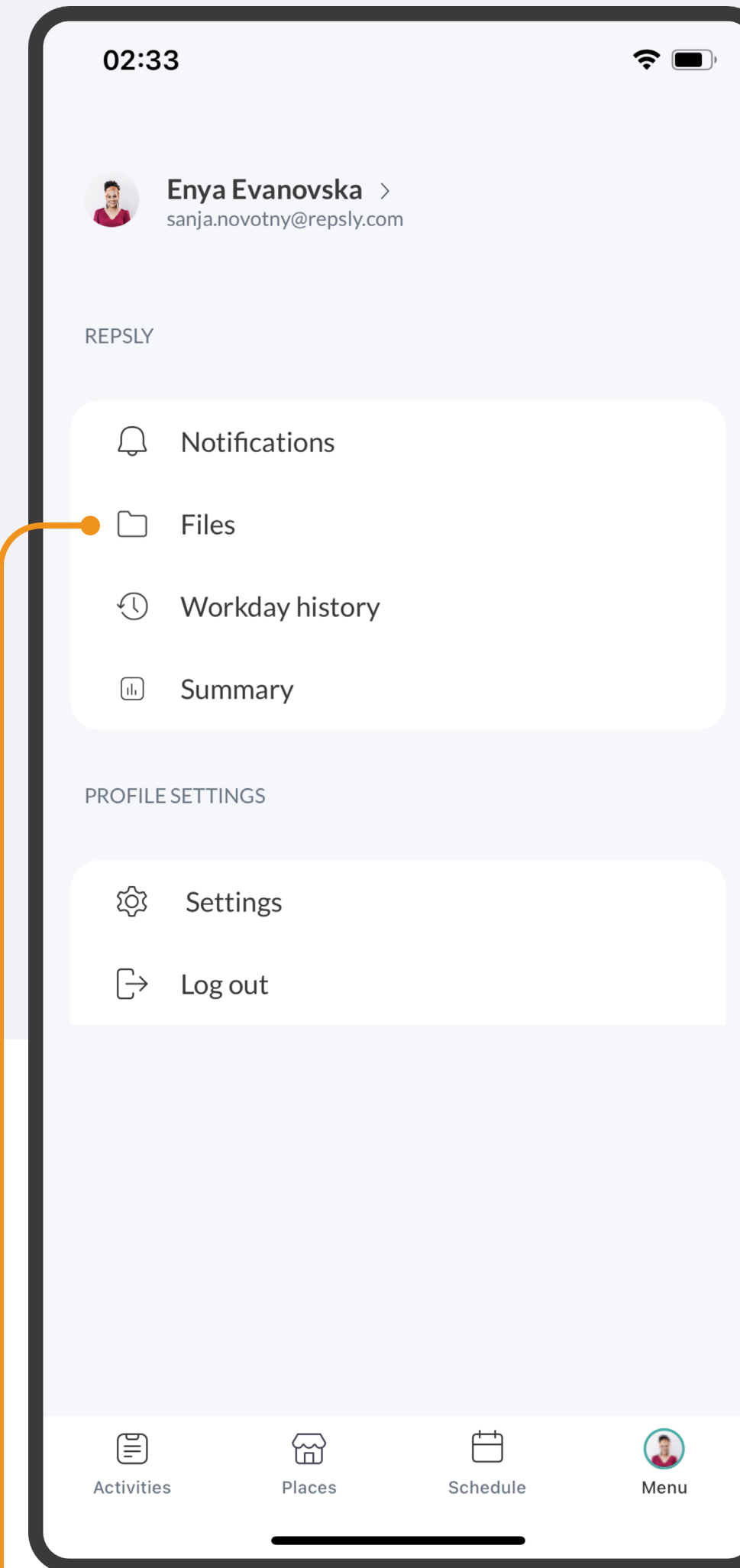
19

HOW TO ACCESS FILES ON THE GO

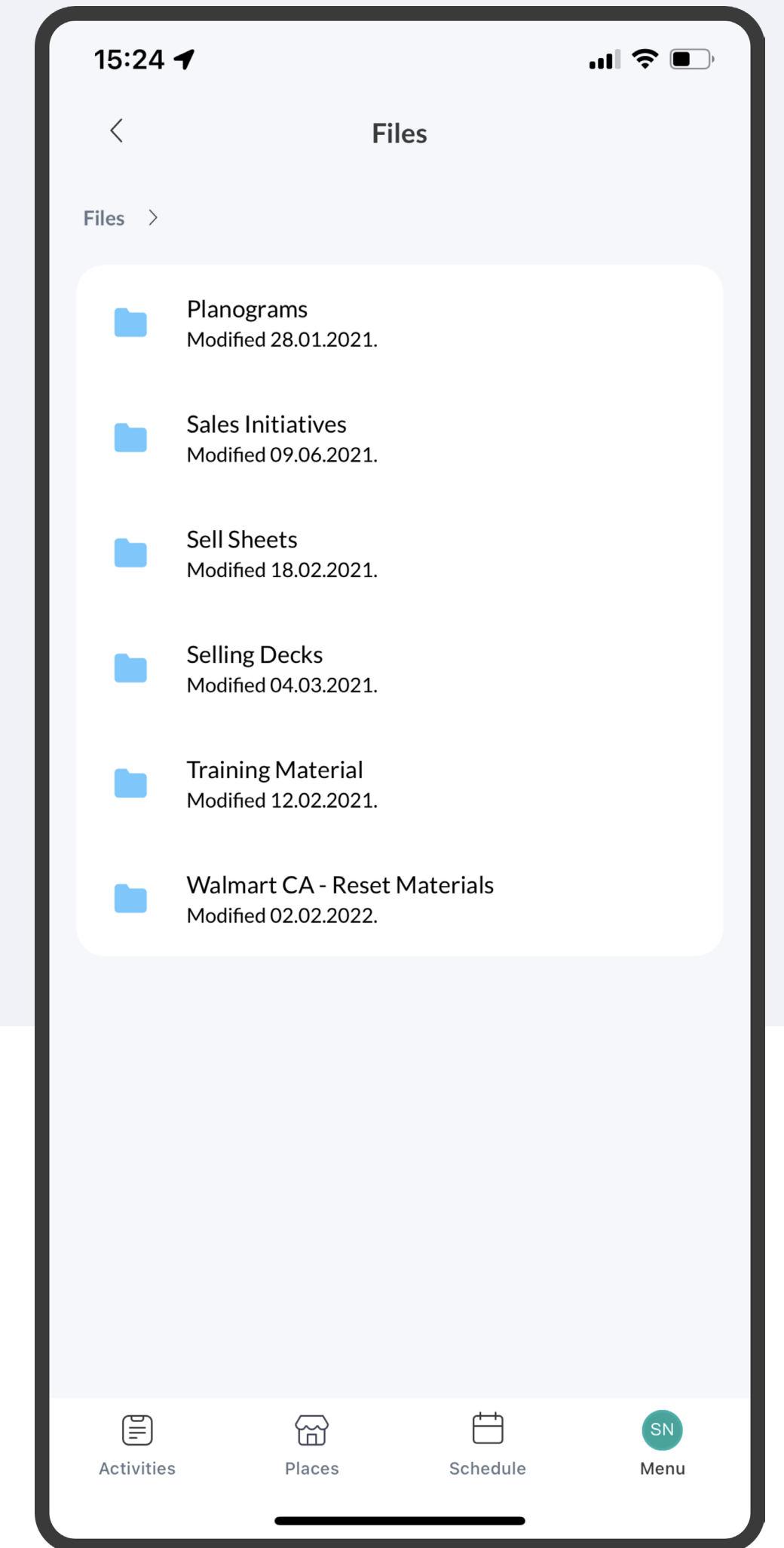
The Repsly app gives you access to all the files you need to win in your accounts. You can browse all files in the document library, or quickly find key documents assigned to specific places.

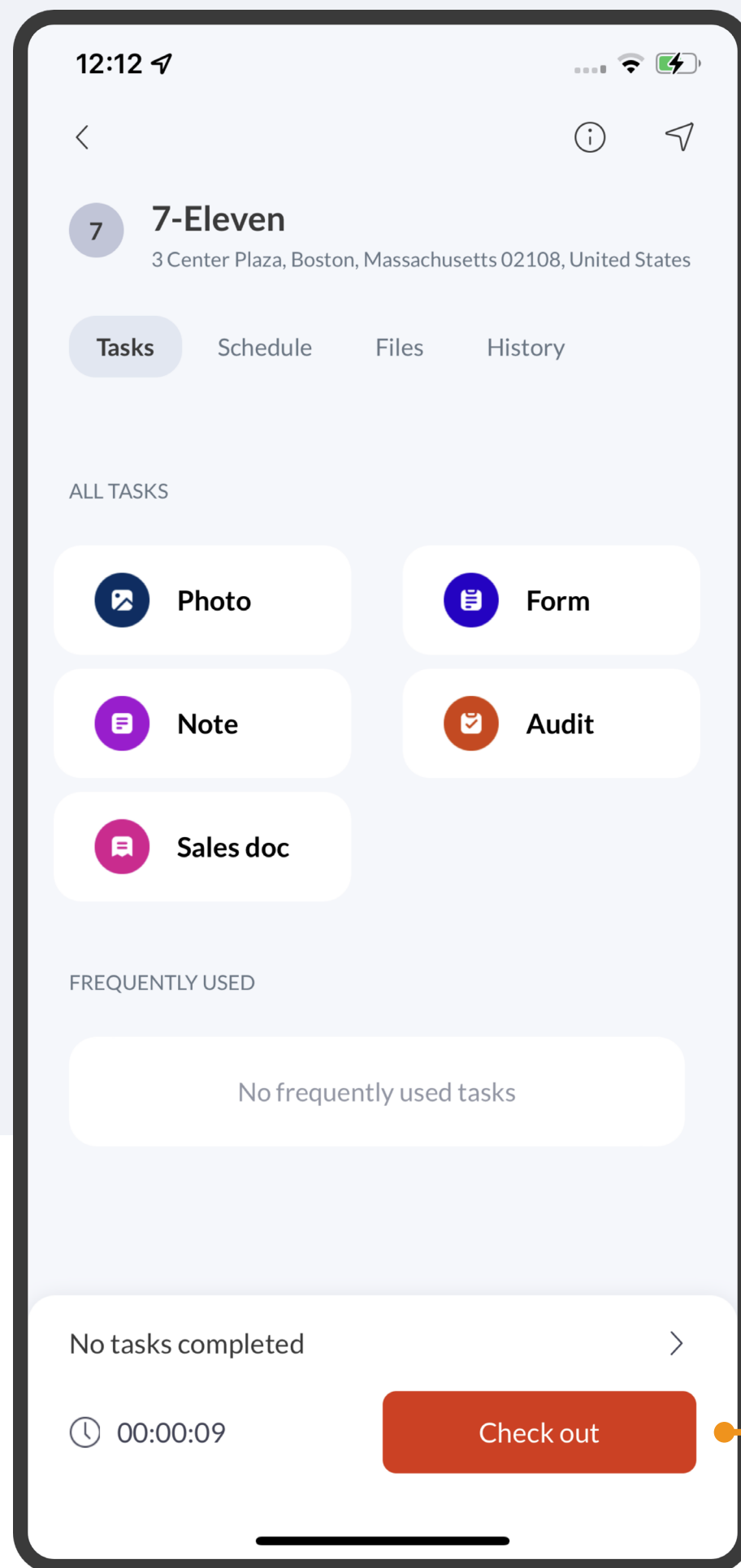


1 Click on the **MENU** icon.

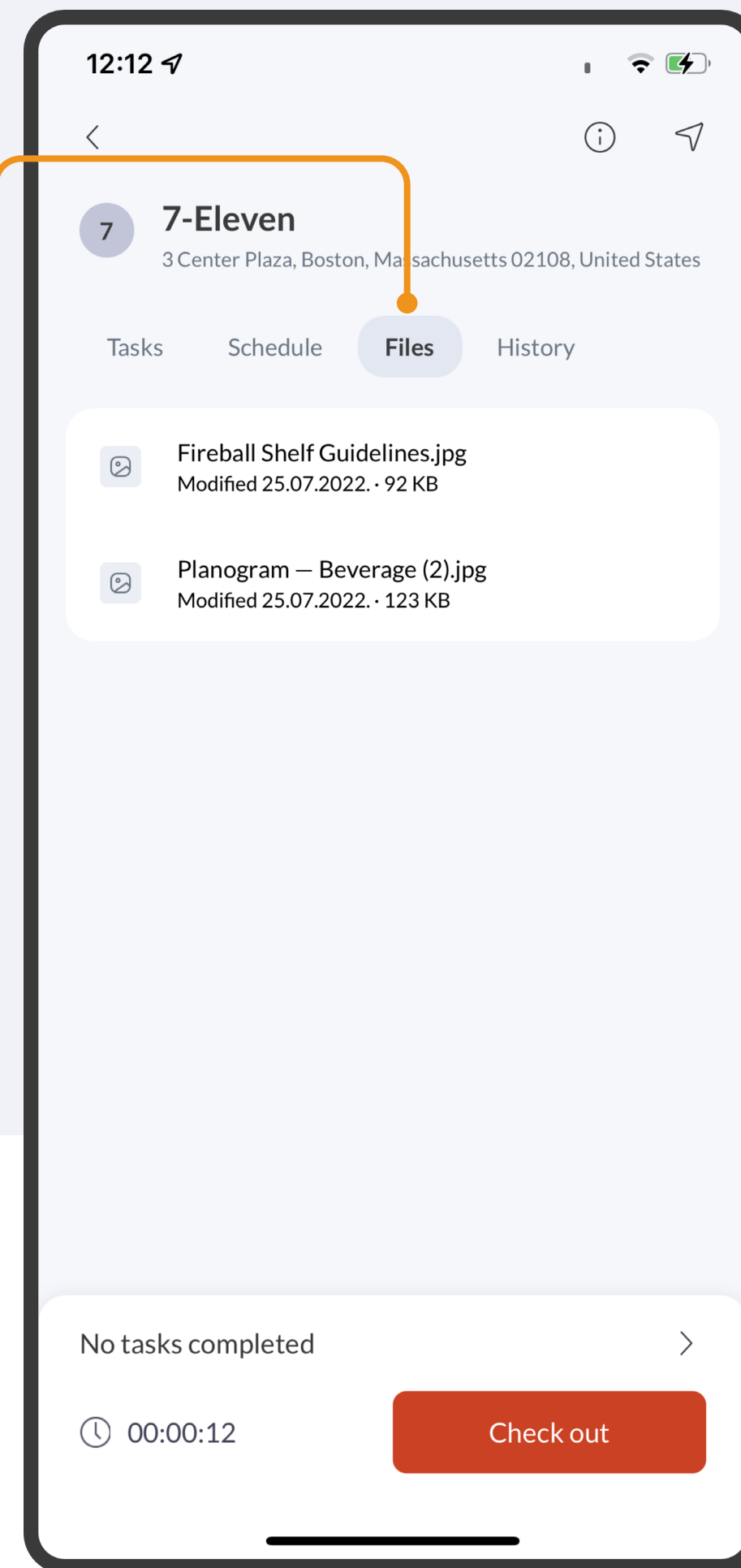


2 Select **FILES** and select the materials you need.





3 To access **FILES** linked to a specific place, check in to a place.



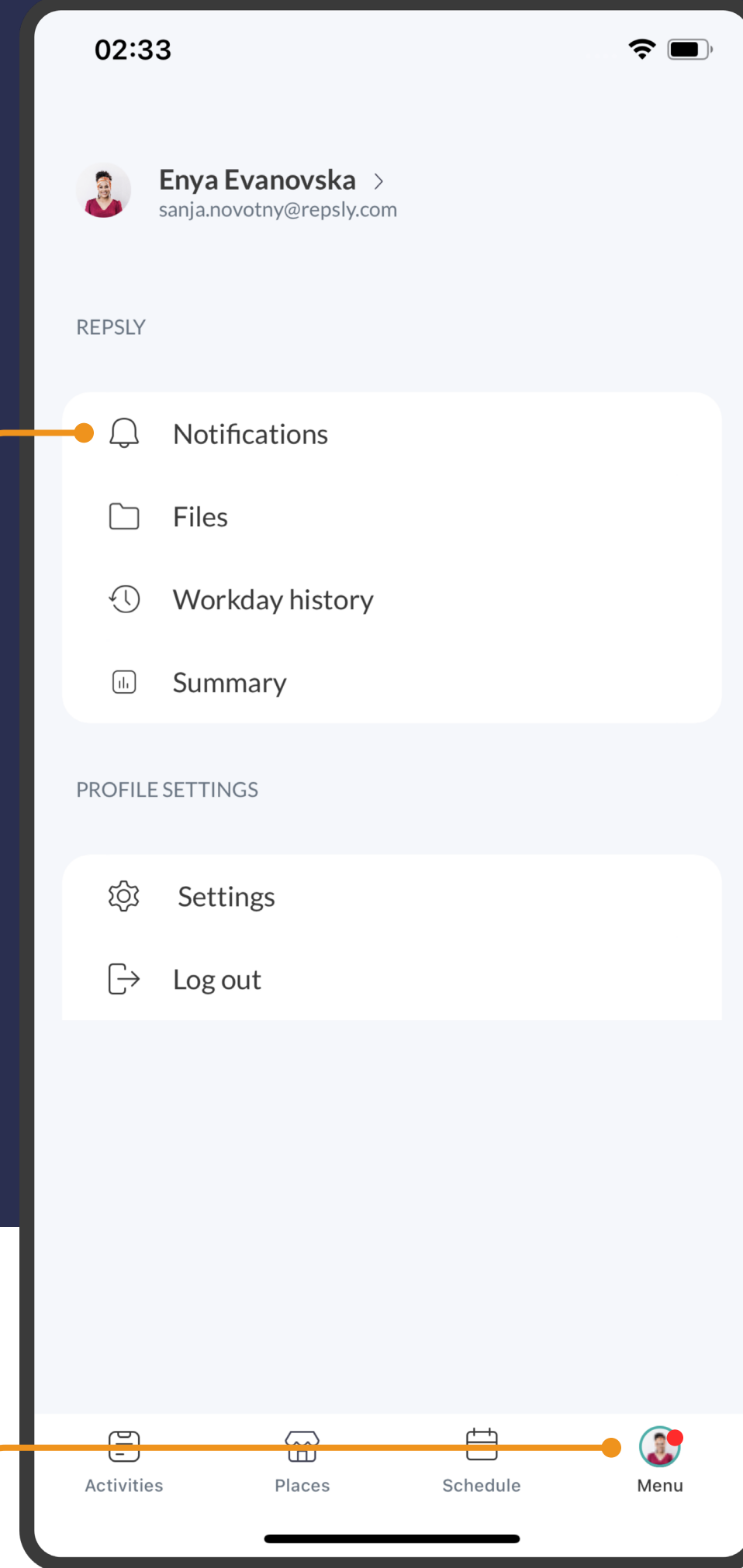
4 Tap on the **FILES** and select the attachment you need to complete your visit.



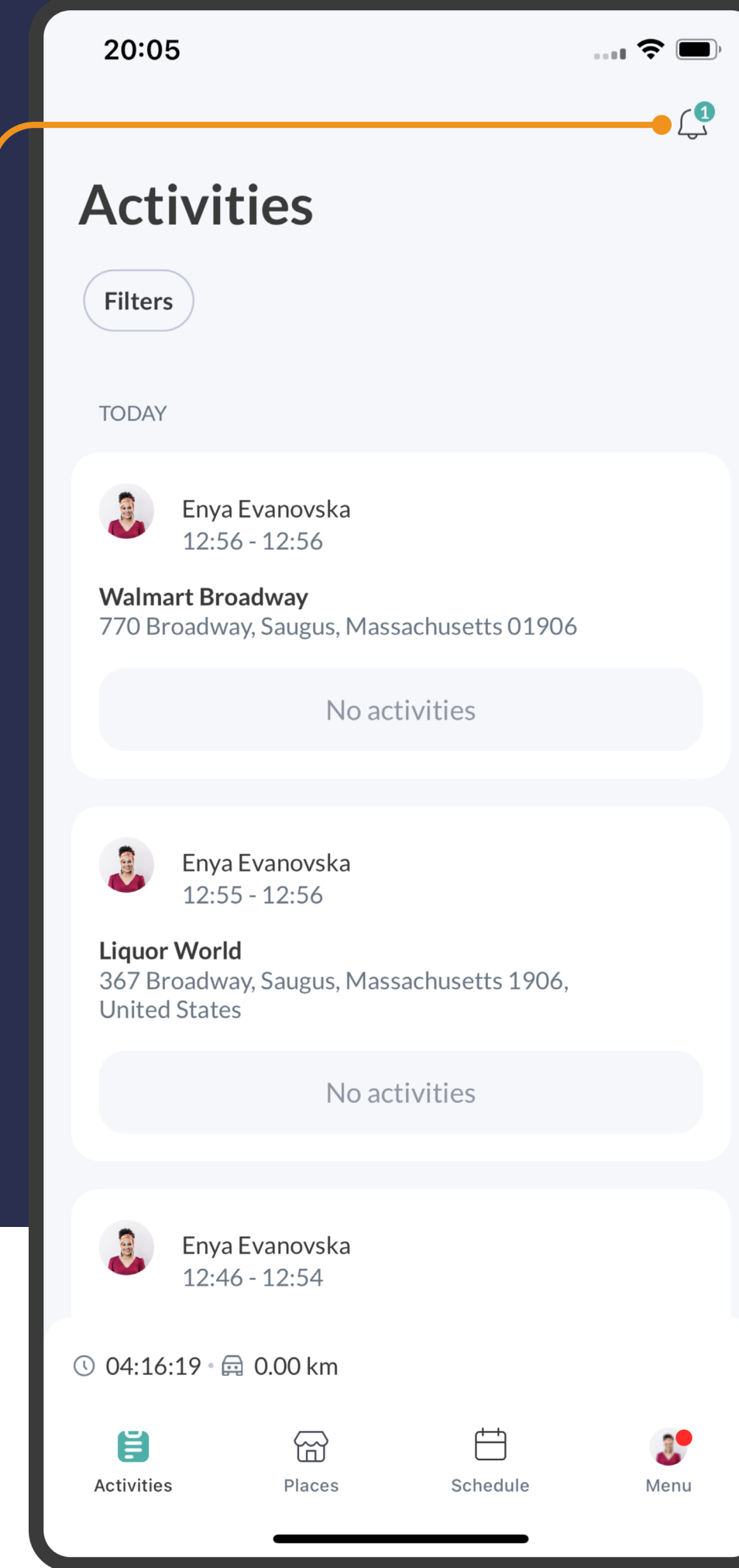
20

HOW TO VIEW YOUR NOTIFICATIONS

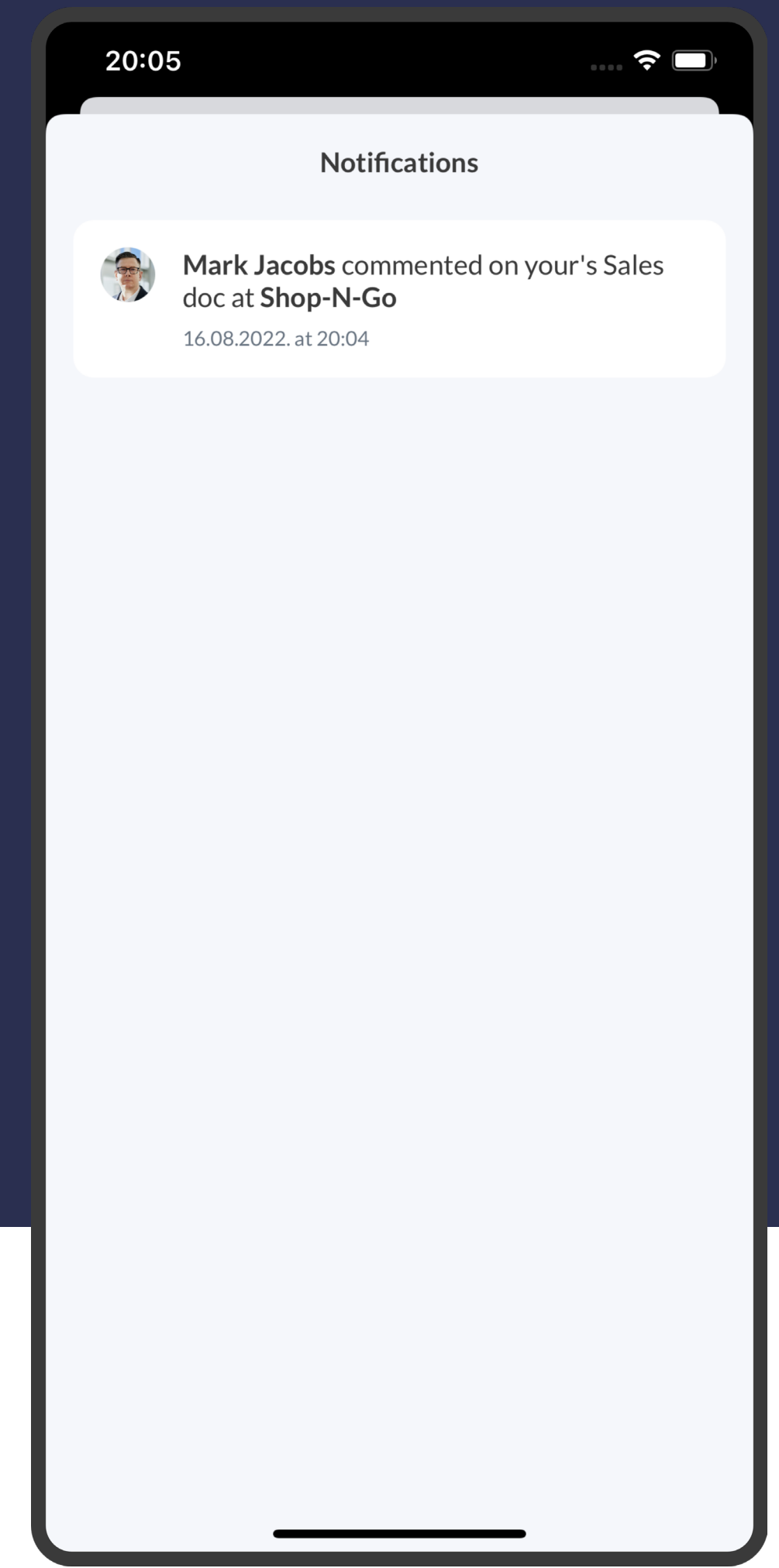
You will receive a notification any time one of your team members comments on one of your activities.



1 A red dot will appear on the **MENU** icon when you have a notification. Tap Notifications to see all unread notifications.



2 Or, tap on the **BELL** icon at the top right corner of the Activities screen to review your notifications.

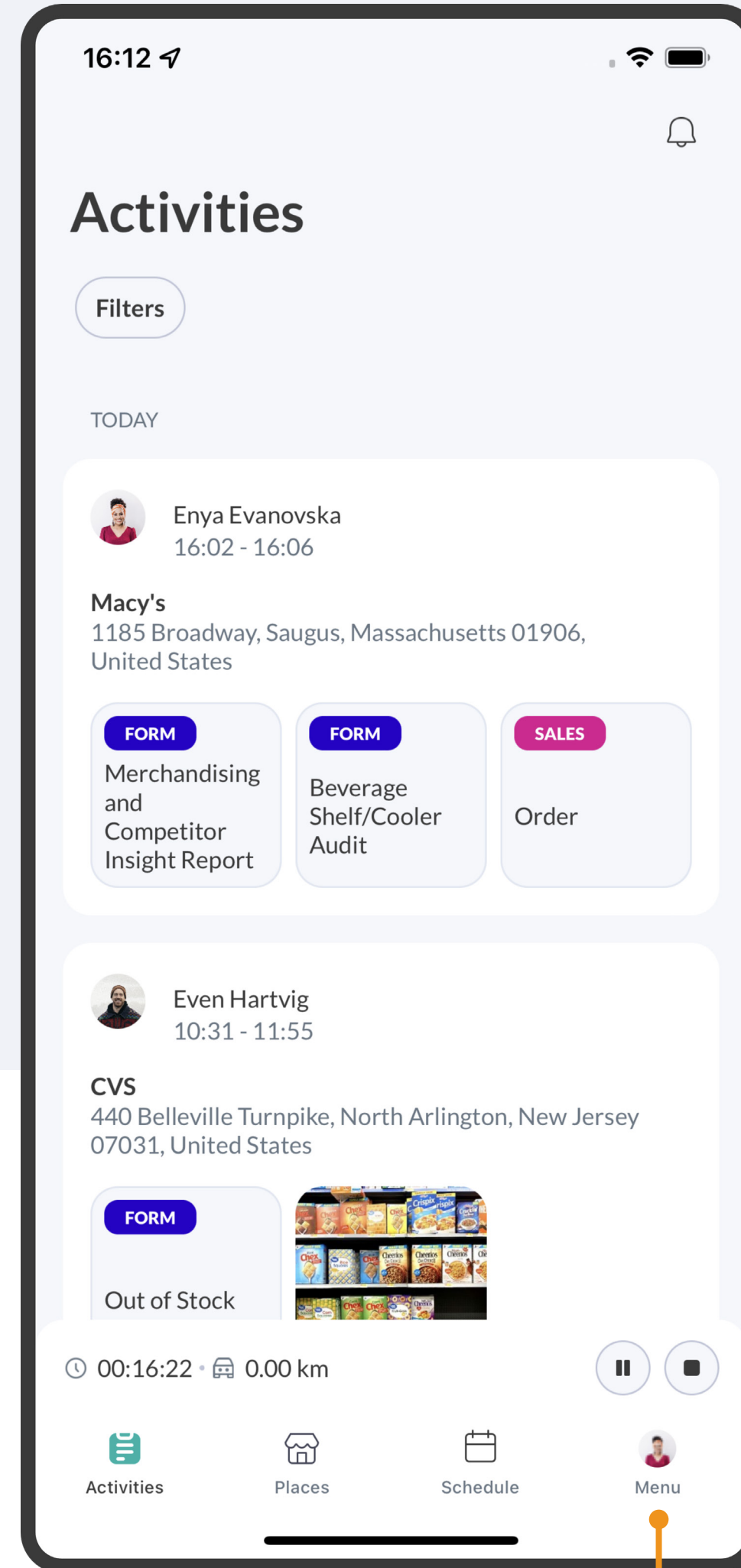


3 Notifications are listed with their details in chronological order.

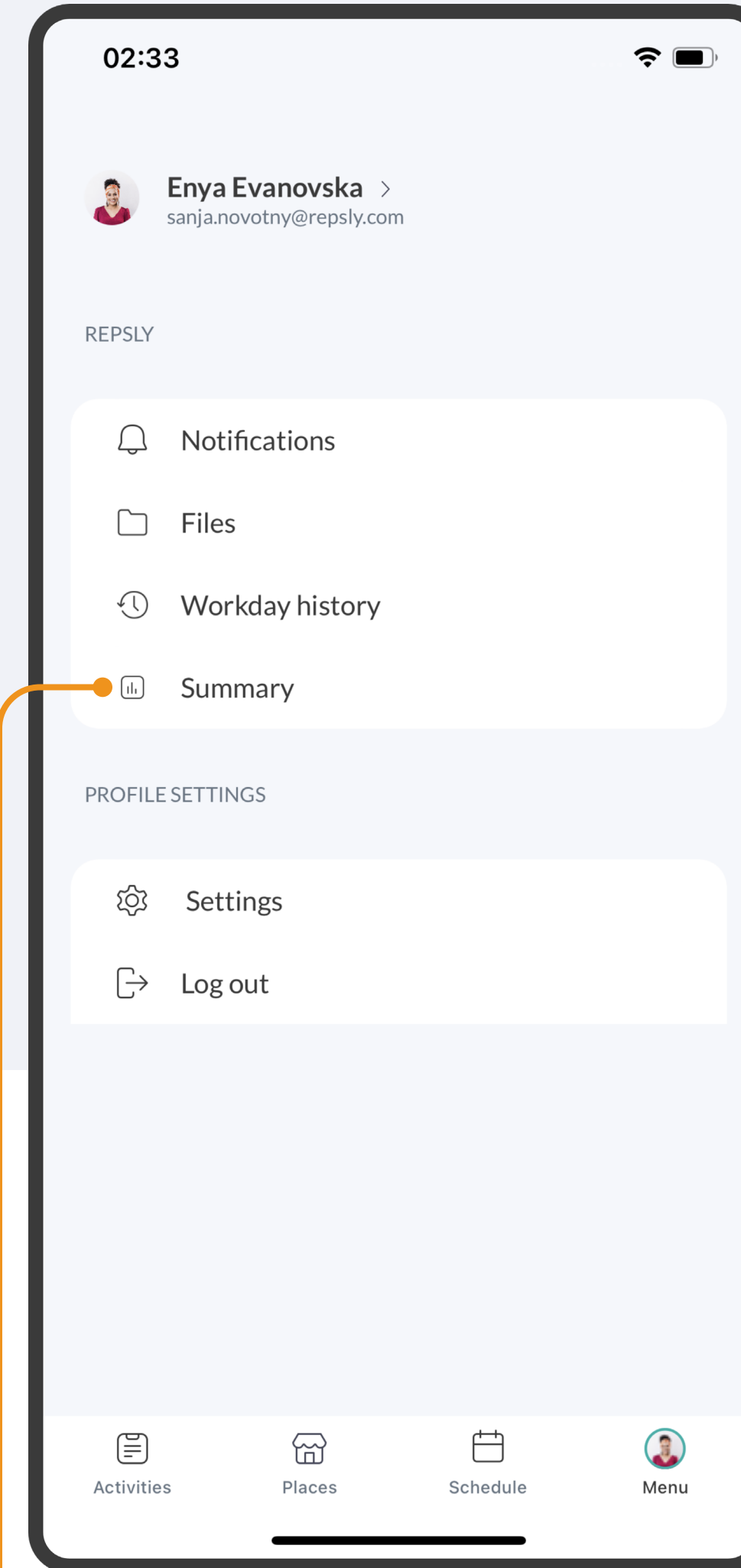
21

HOW TO VIEW A SUMMARY OF YOUR ACTIVITY

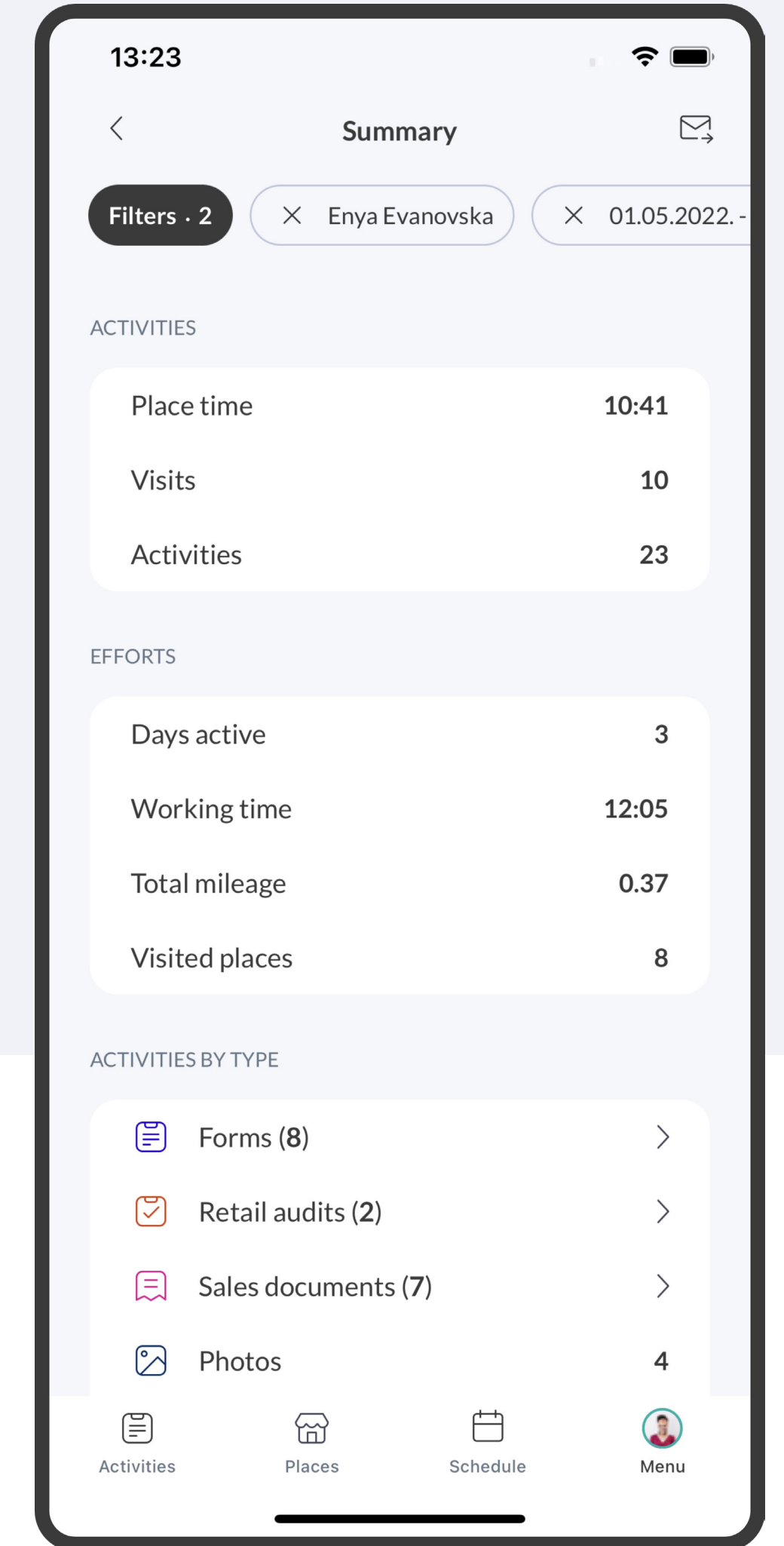
The summary report shows you an overview of your performance, so you can track your work, review your performance and improve your results.



1 Tap on the **MENU** icon.



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

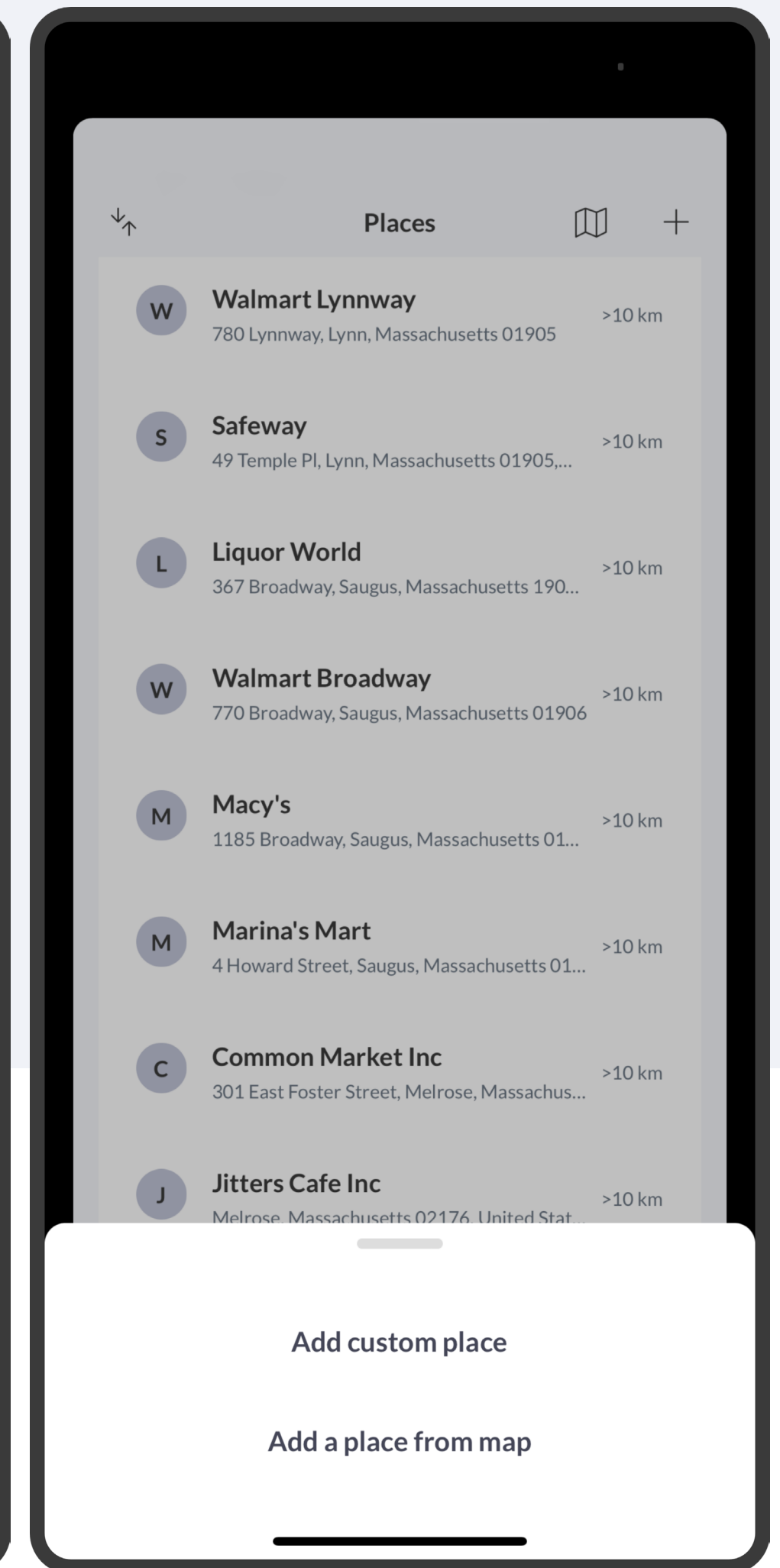
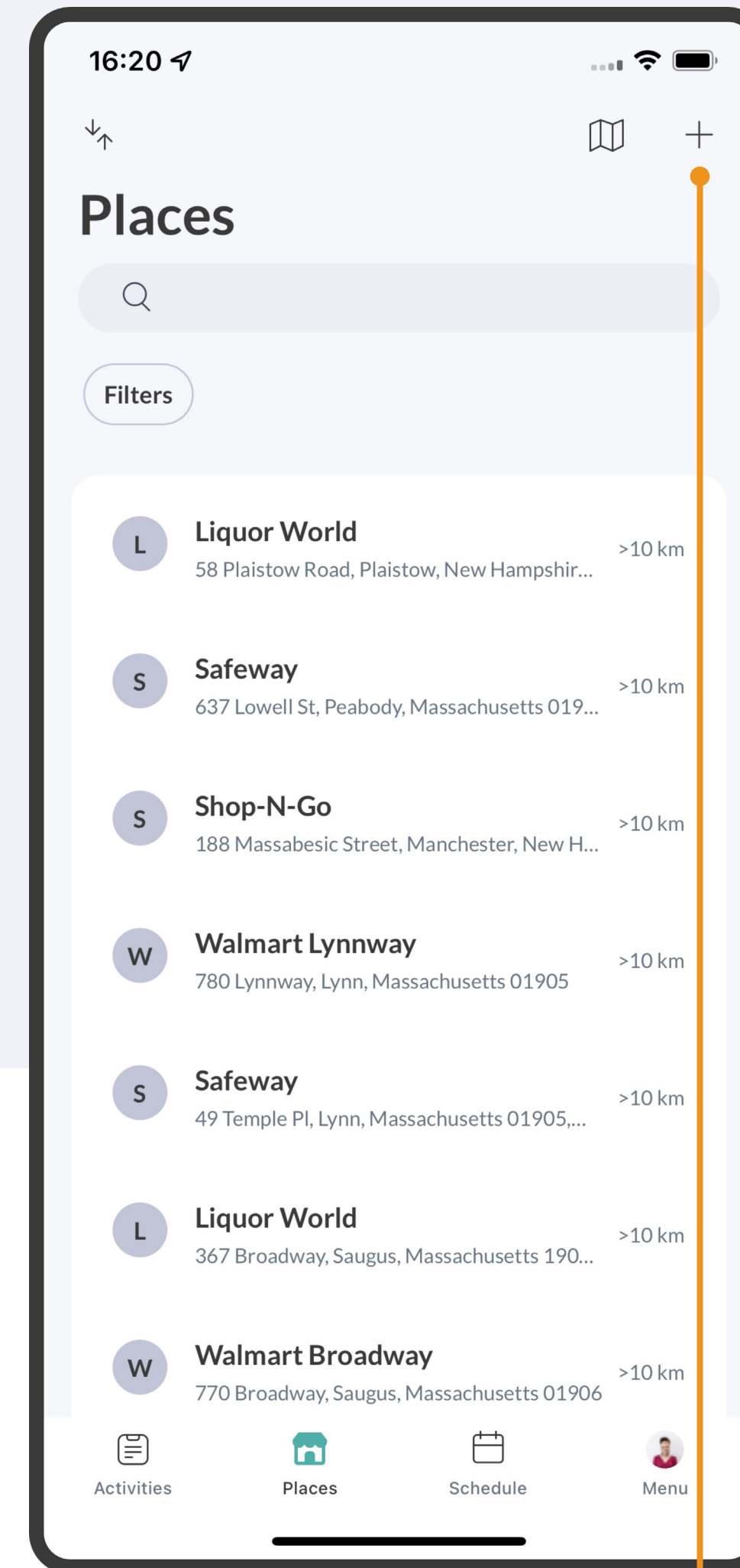
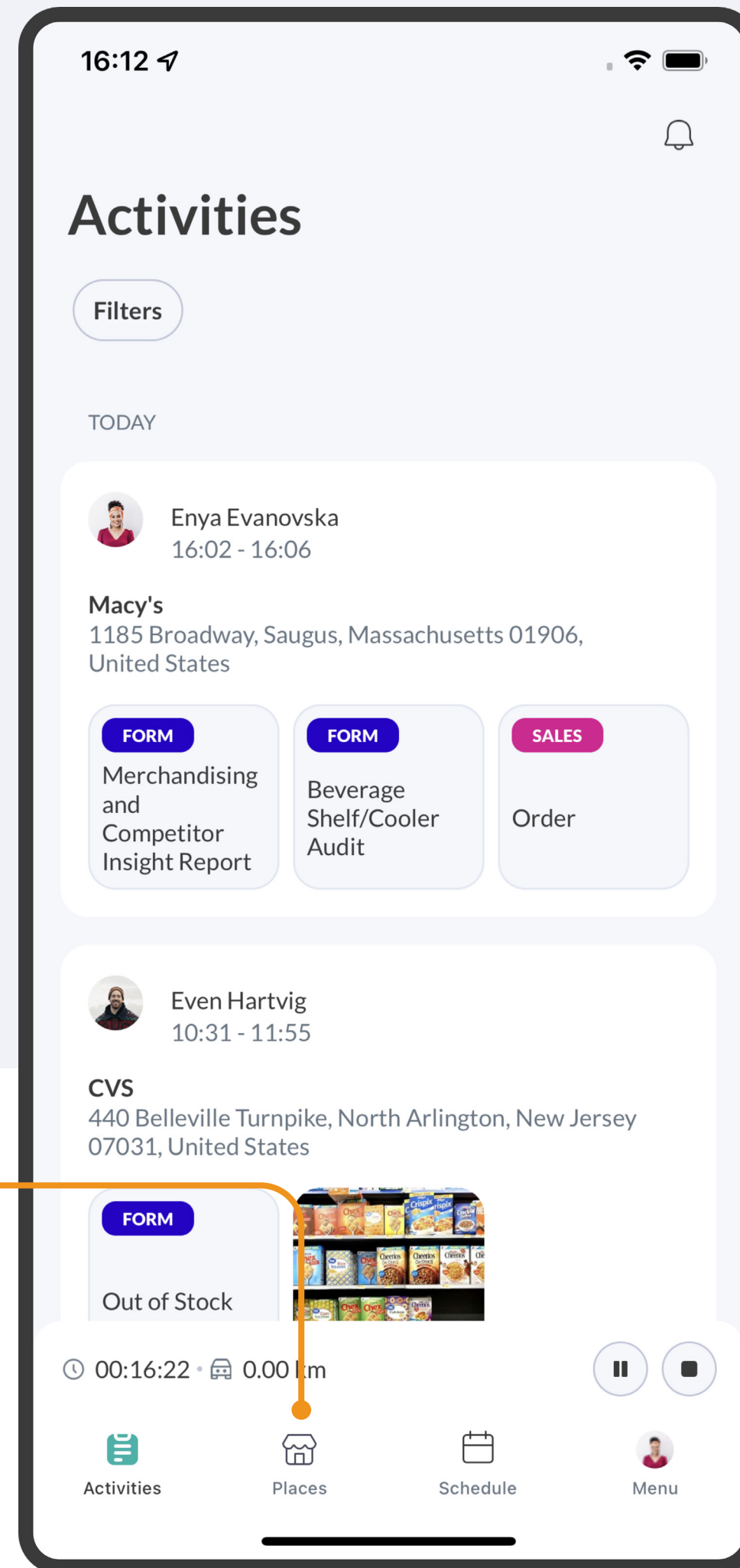


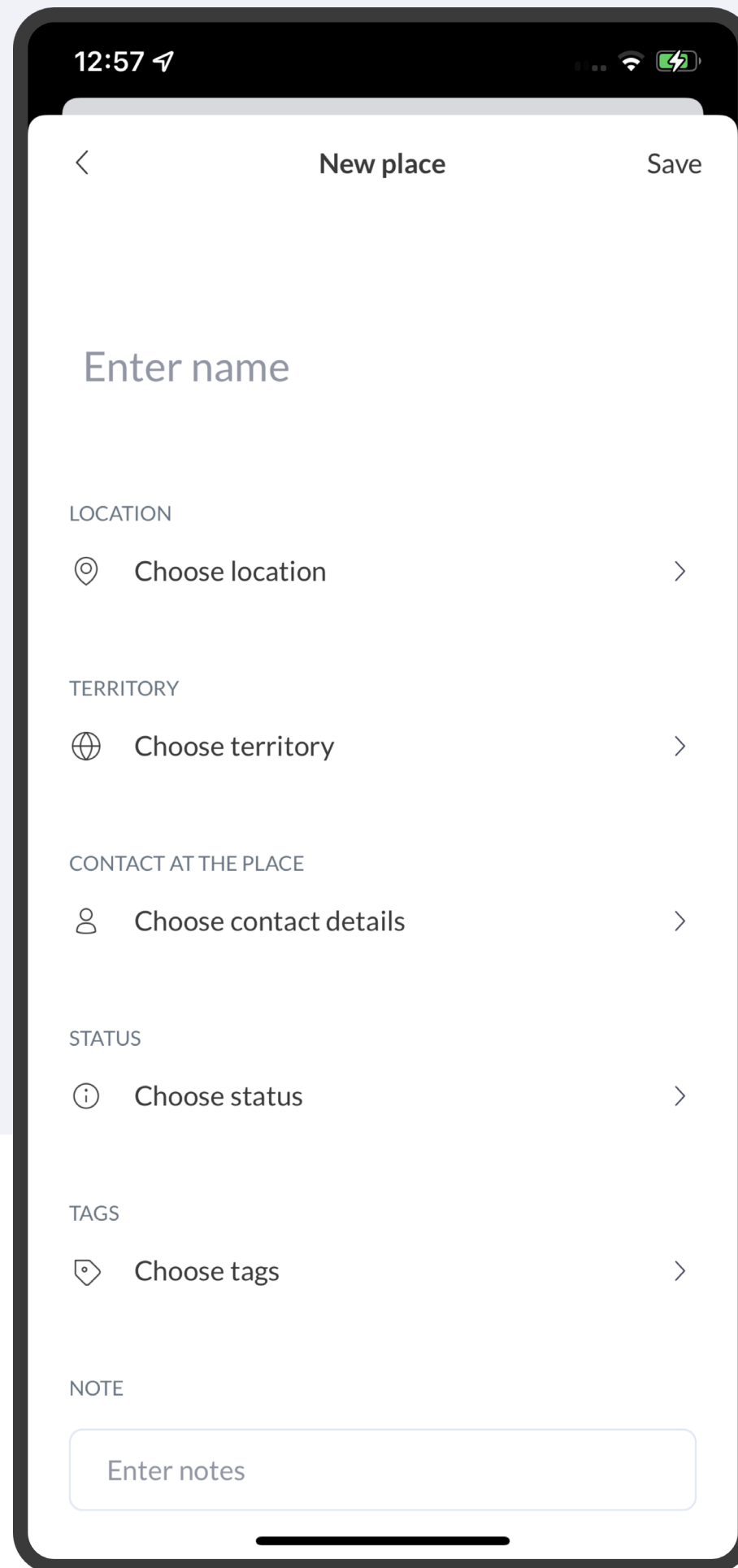
22

HOW TO ADD A PLACE

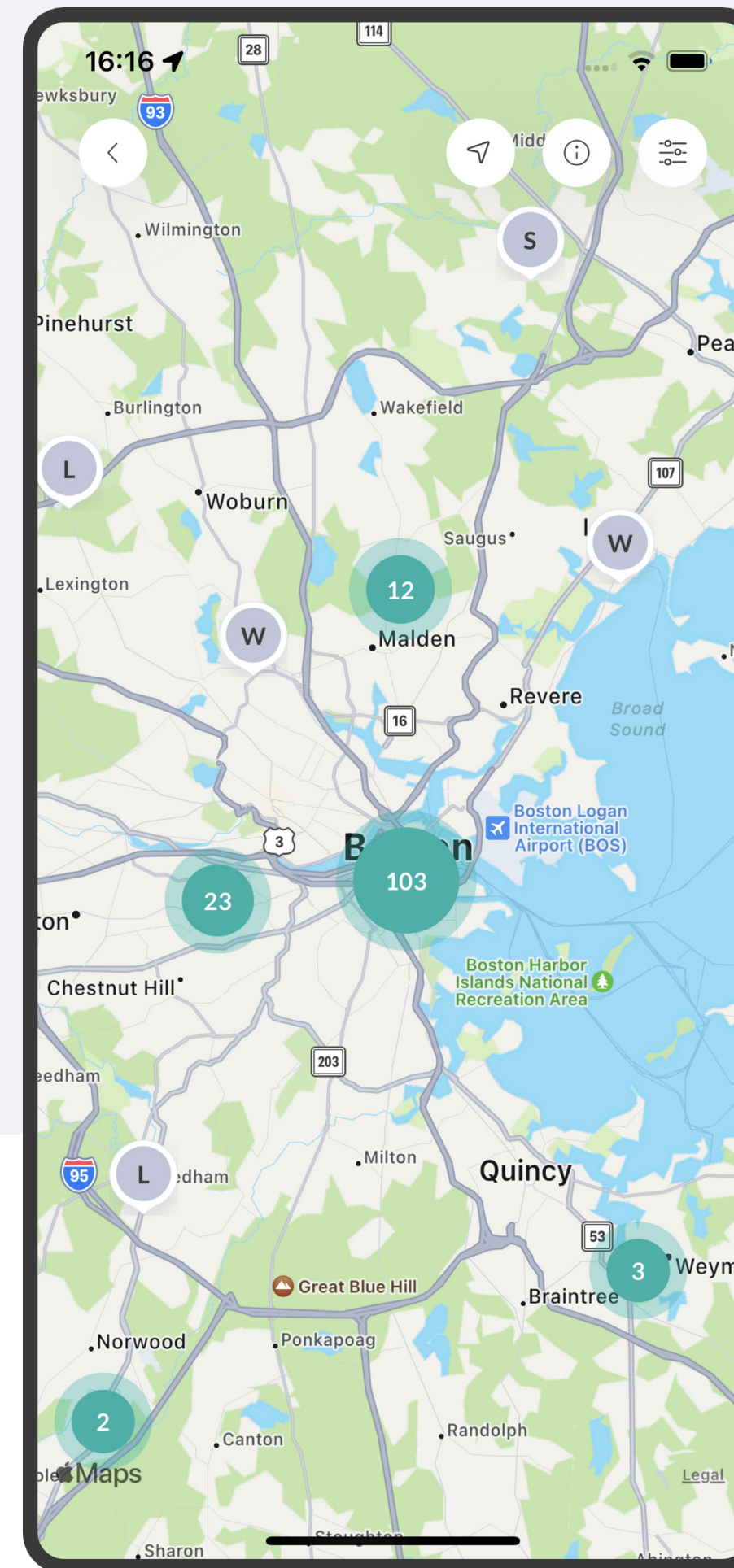
Depending on your account settings, you may be able to add new locations to your place list from the field.

- 1 Click the **PLACES** tab and then tap on the **+ SIGN** at the top of the page.
- 2 You can either choose from **Add custom place** and **Add a place from map**.

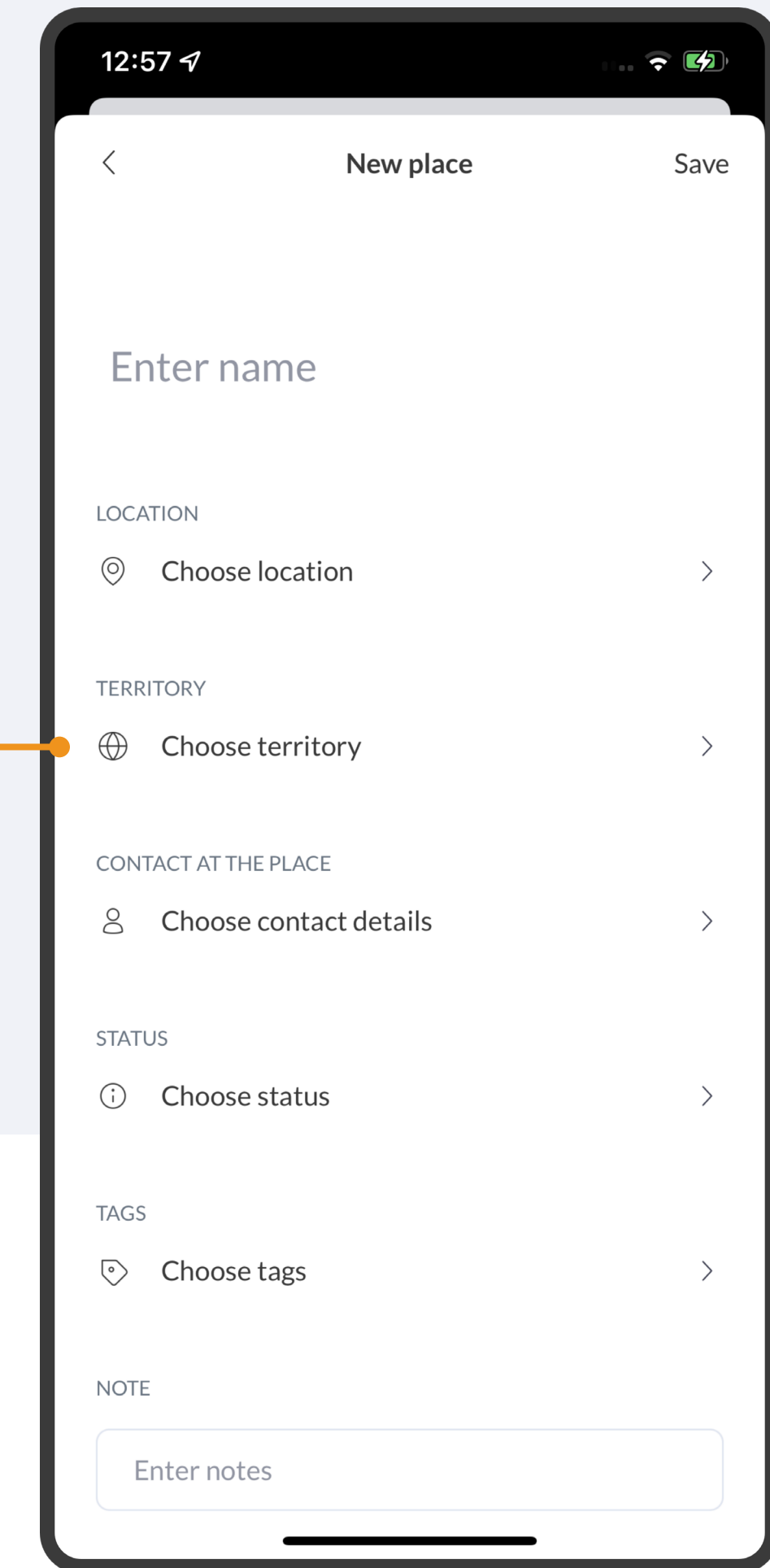




3 If you choose **Add custom place** you will see a new place profile open. Enter the Place's contact info. After your done, click on the **DONE button**.



4 If you have the option to **Add a place from map**, your screen will display your location and the location of prospective leads in your area.



5 If you're assigned to multiple territories, you'll have to select a territory to which the new place will be assigned. If you have access to only one territory, the newly added place will automatically get assigned to that territory.