BACKOFFICE MANAGER TRAINING GUIDE

SHORT EDITION

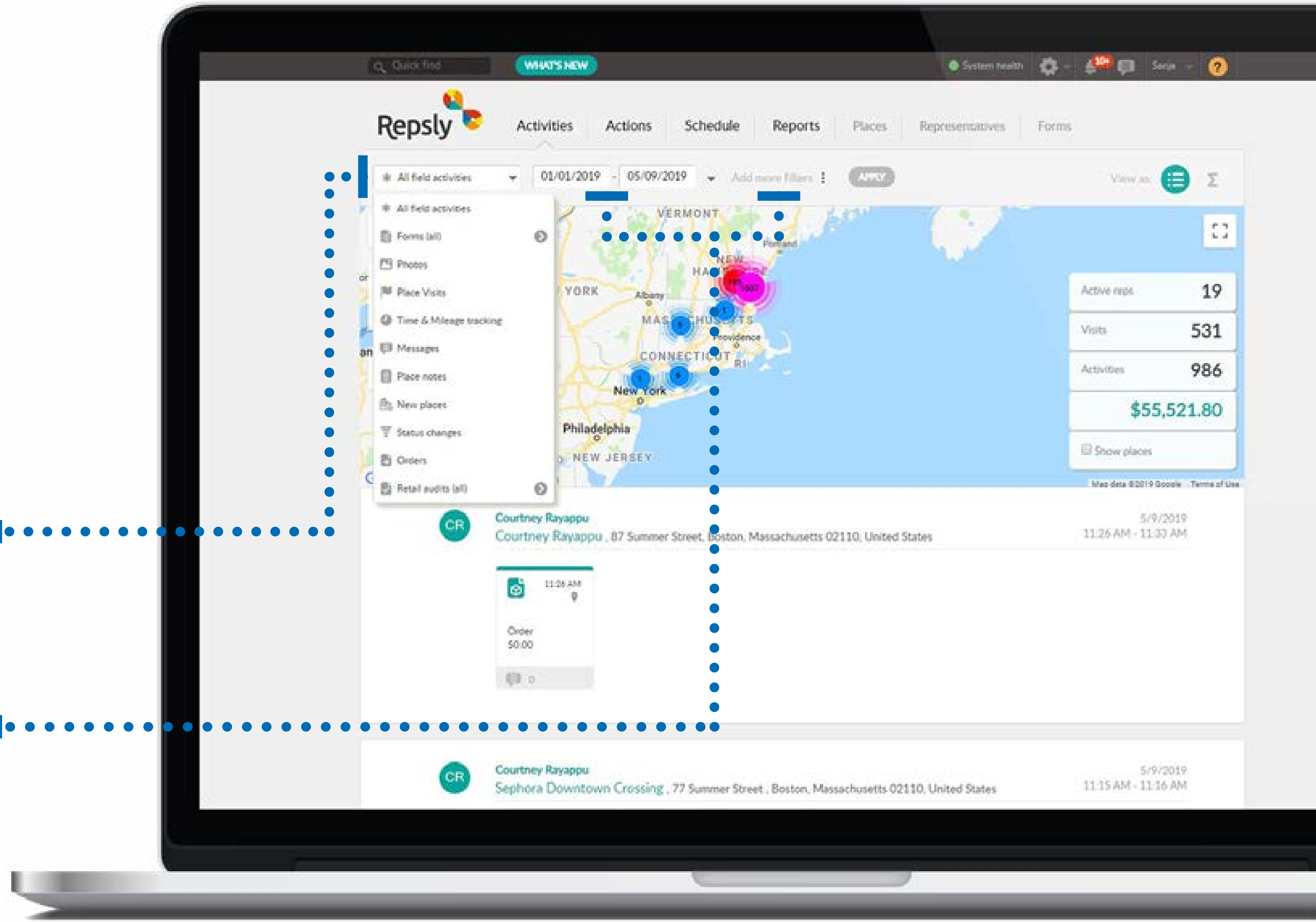
Repsly™

STARTING YOUR DAY

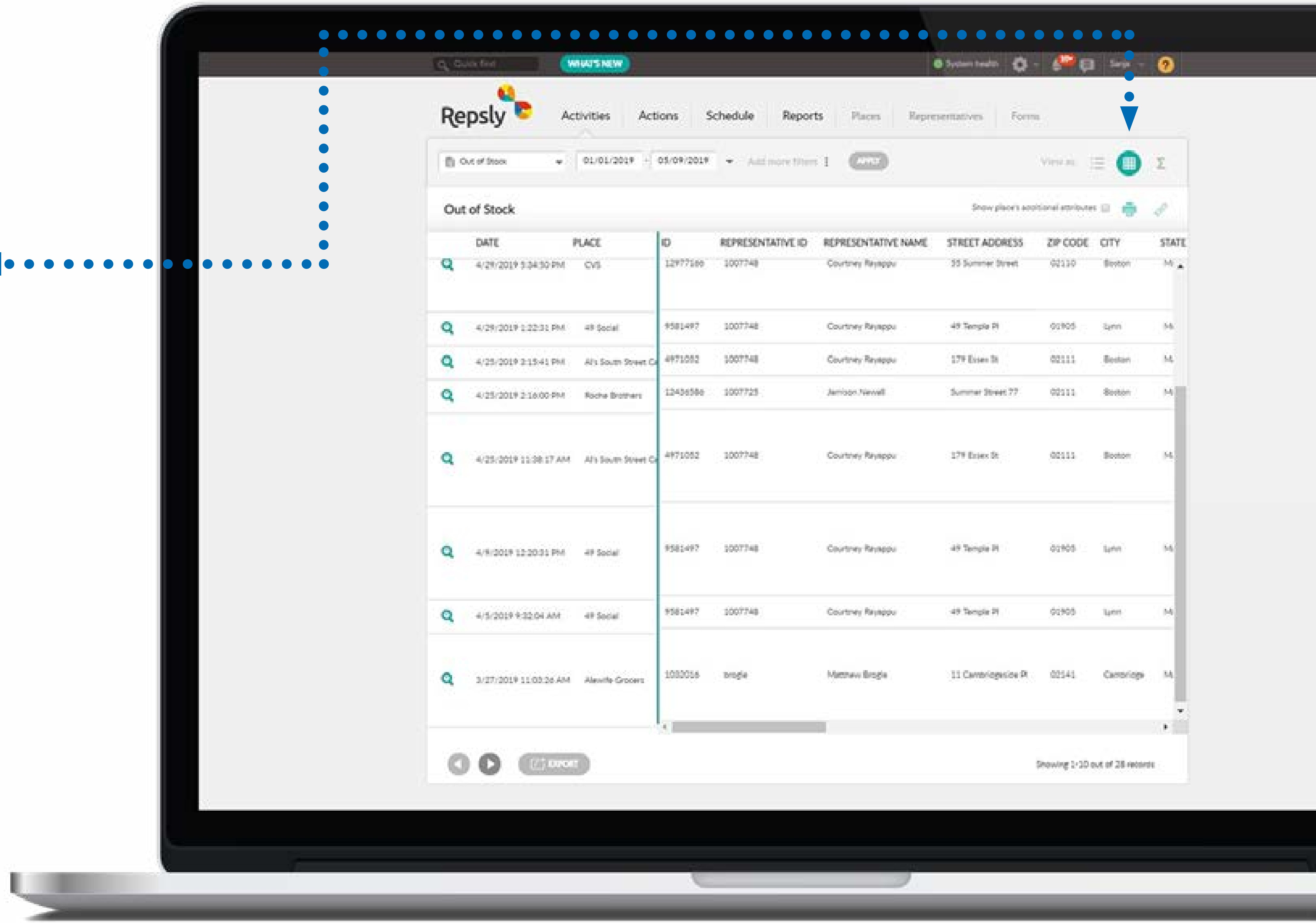
Applying filters will allow management to see and analyze specific activities, people or places in order to manage data more consistently.

You can see chronologically **all activities** (purchase orders, photos, messages, visit notifications, time and mileage, notes, etc.) in real-time. This creates efficiency with regards to team management and collaboration.

Use the **filters** above the map to narrow your search criteria, such as filtering by date range, by a specific rep, tag or territory.



The **tabular view** is available for selected activities and it provides you with a more detailed view.

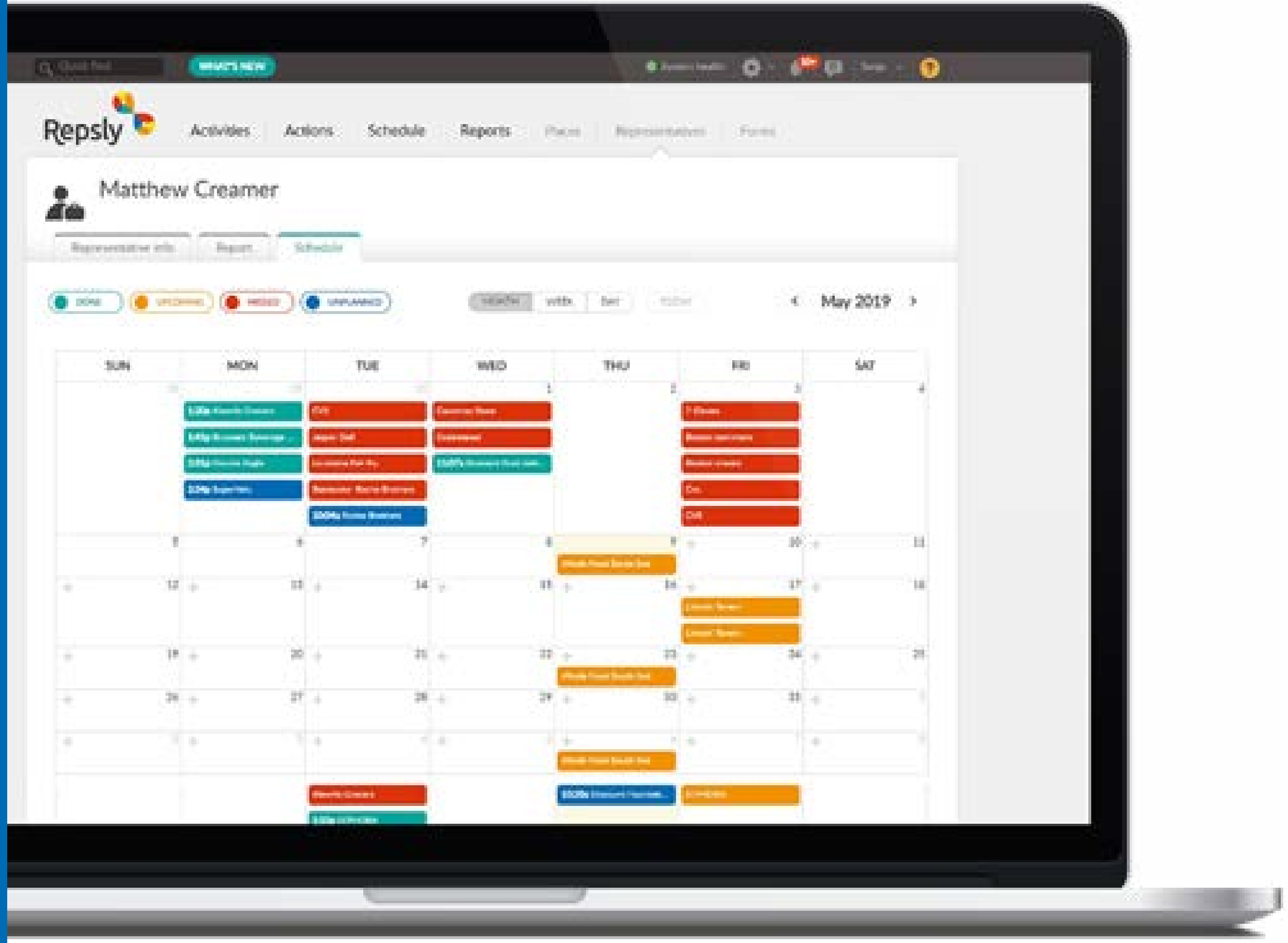


To help you get started with our Activities features, please refer to our knowledge base articles:

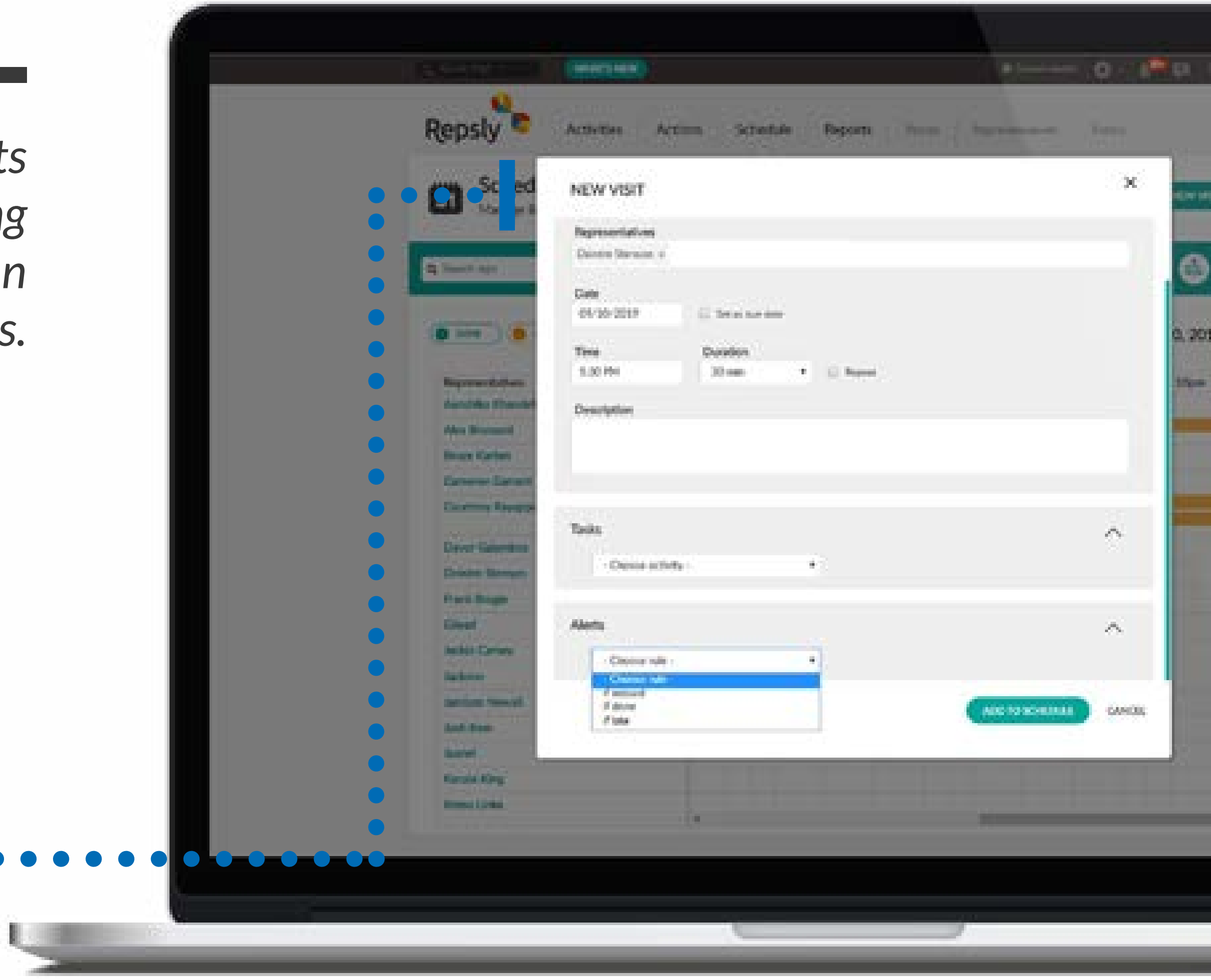
Activity Feed

PLANNING YOUR ROUTES

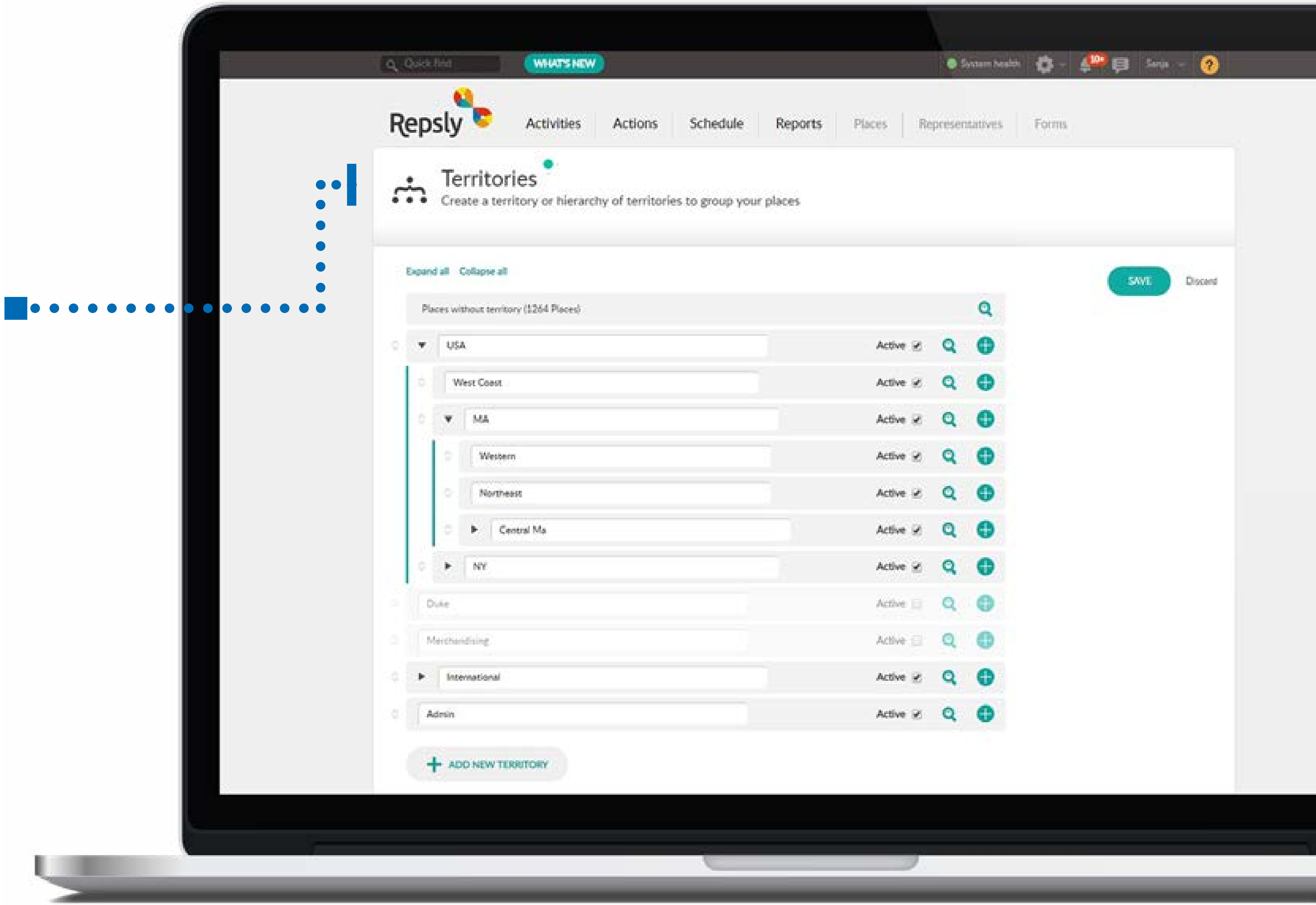
Staying organized and scheduling your account visits can be hard. You can help your Representatives by using Schedule feature, where you can immediately create an event that allows the reps to make the necessary visits.



You can also **set the duration**, **leave a description** and **set tasks** from the representative and **alerts** for yourself.



You also have the option to add places and include **additional (custom) attributes** - such as sales pipeline or territory. With Territories, you can easily assign your representatives to specific Territories or multiple levels of the hierarchy - depending on their role.



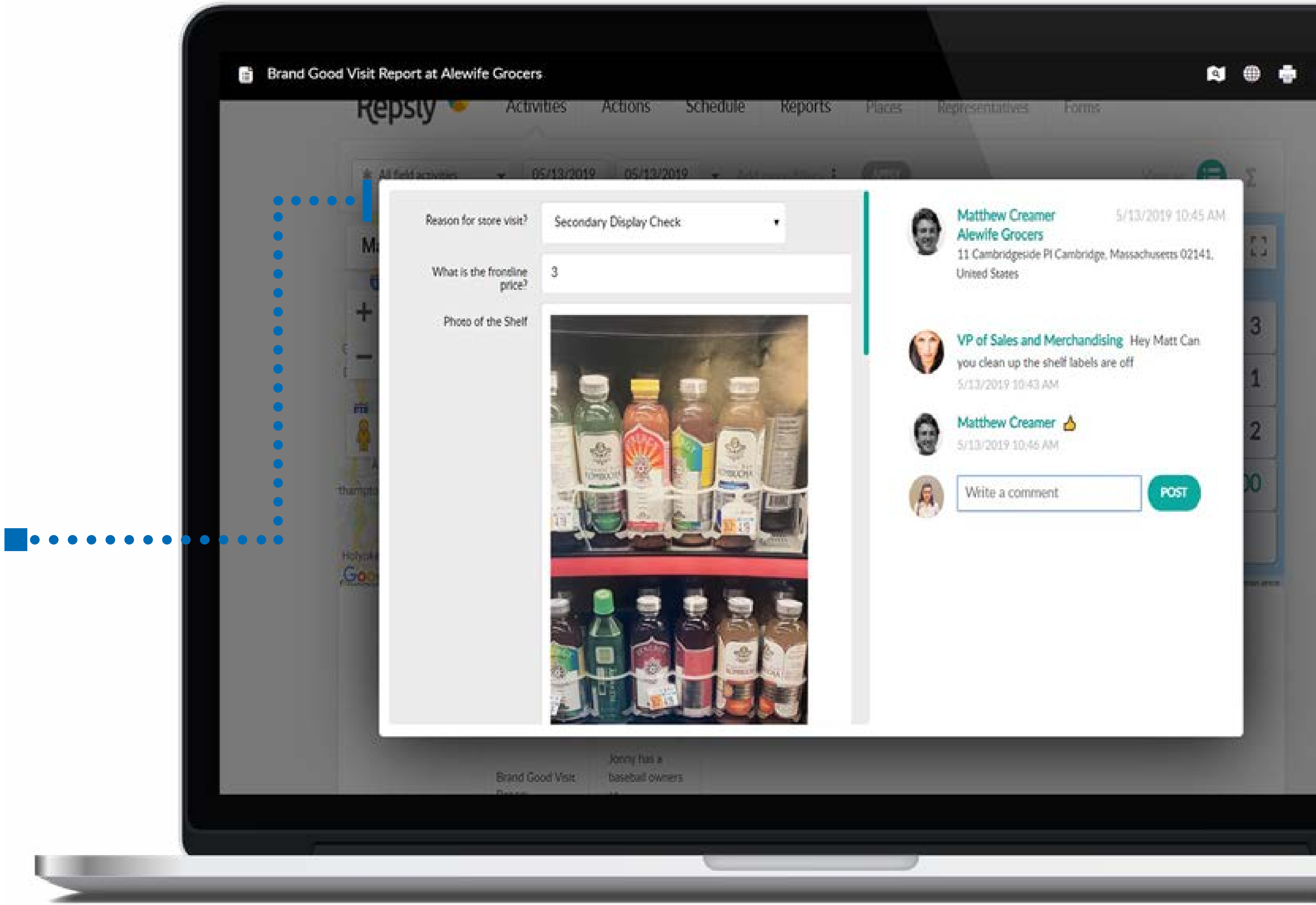
To help you get started with our optimizing features, please refer to our knowledge base articles:

- **Schedule**
- **Places**

VISITING AN ACCOUNT

You can filter your representatives' activities by place visit which will allow you to see all the actions they've made in that place.

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. Add questions to your form and define whether the answer will be mandatory, as well as which type of data the answers will contain.

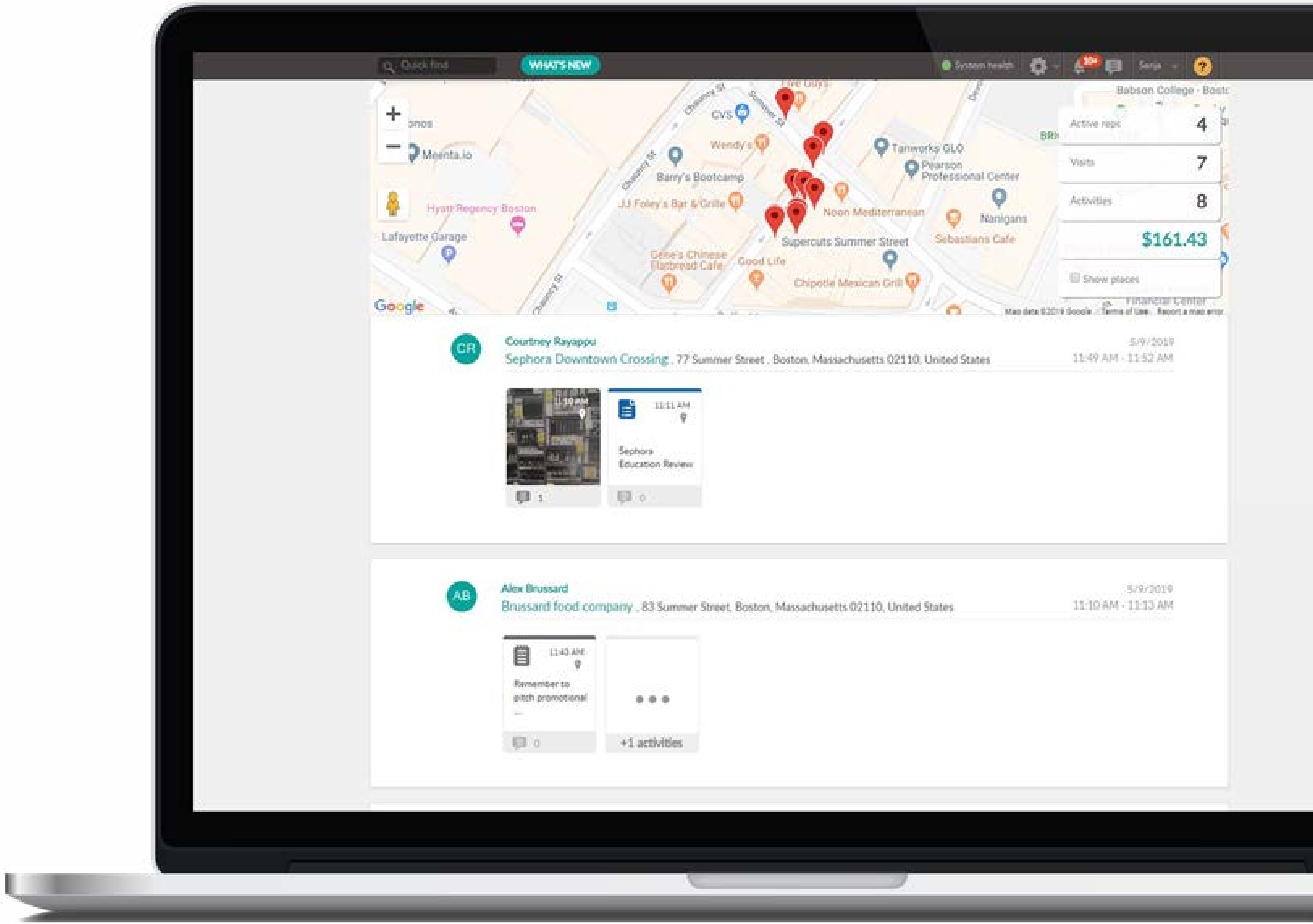


By creating a **place note**, your reps can improve transparency between departments. This Note can consist of anything that they feel is noteworthy recording during a regular place visit.

By capturing **photos** on a visit, your reps can create an excellent photo archive of storefronts, shelves or promotional materials. This will allow you to see changes and improvements made on each visit.

To help you get started with our places features, please refer to our knowledge base articles:

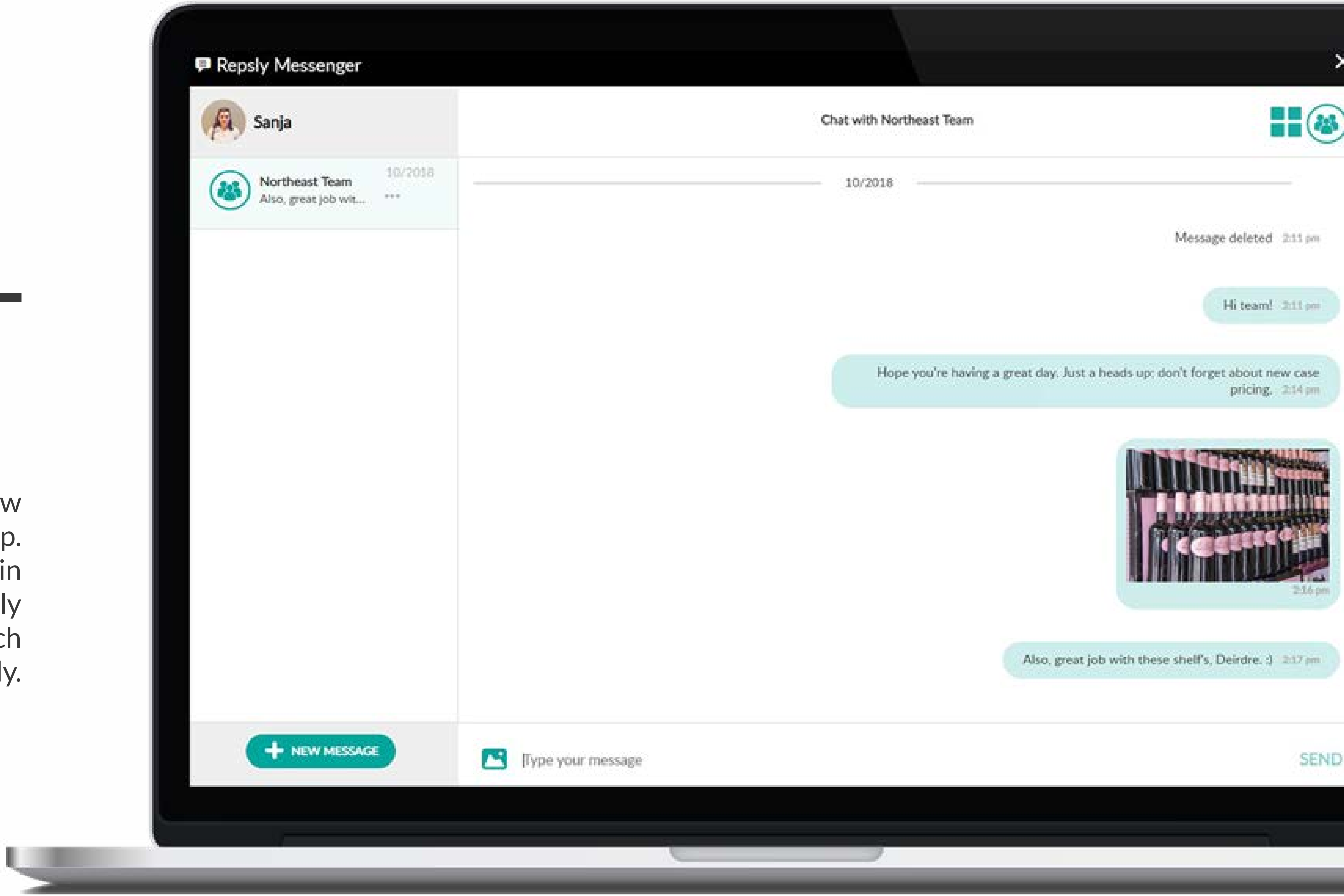
- Forms
- Place notes
- Photos



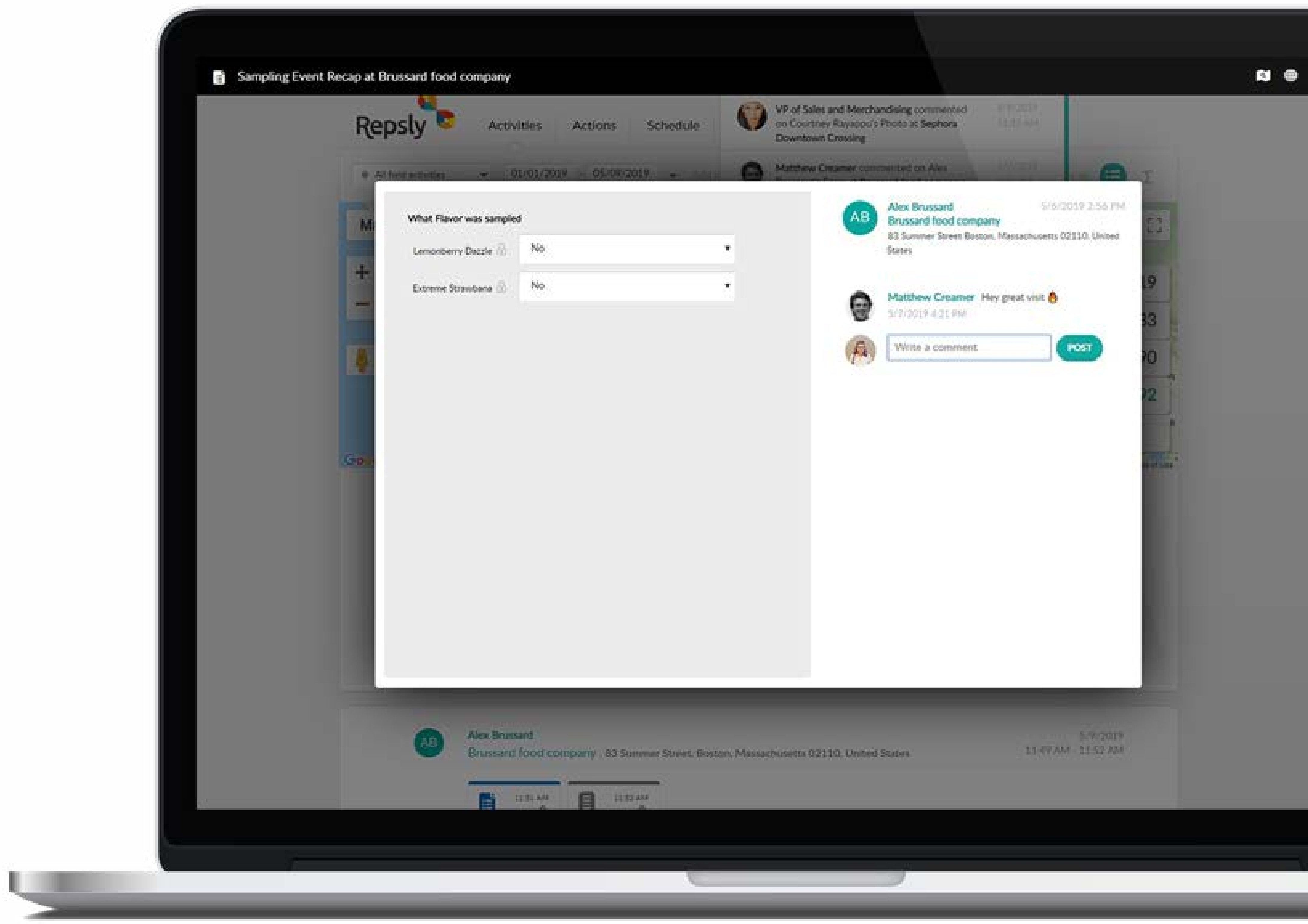
COMMUNICATE WITH YOUR TEAM

Repsly also allows you to improve team communication, collaboration, and coaching.

With our **Messaging** feature, teammates can now message one on one or in groups all from their app. They can share insights or wins (including photos) in context while doing their work. Managers can easily get information out to their entire team or coach individual teammates directly.



Also, Repsly provides management to ask questions about specific activities that have just happened in the field. After a **comment** is posted, the rep who created the activity will receive a notification and they will be able to reply.



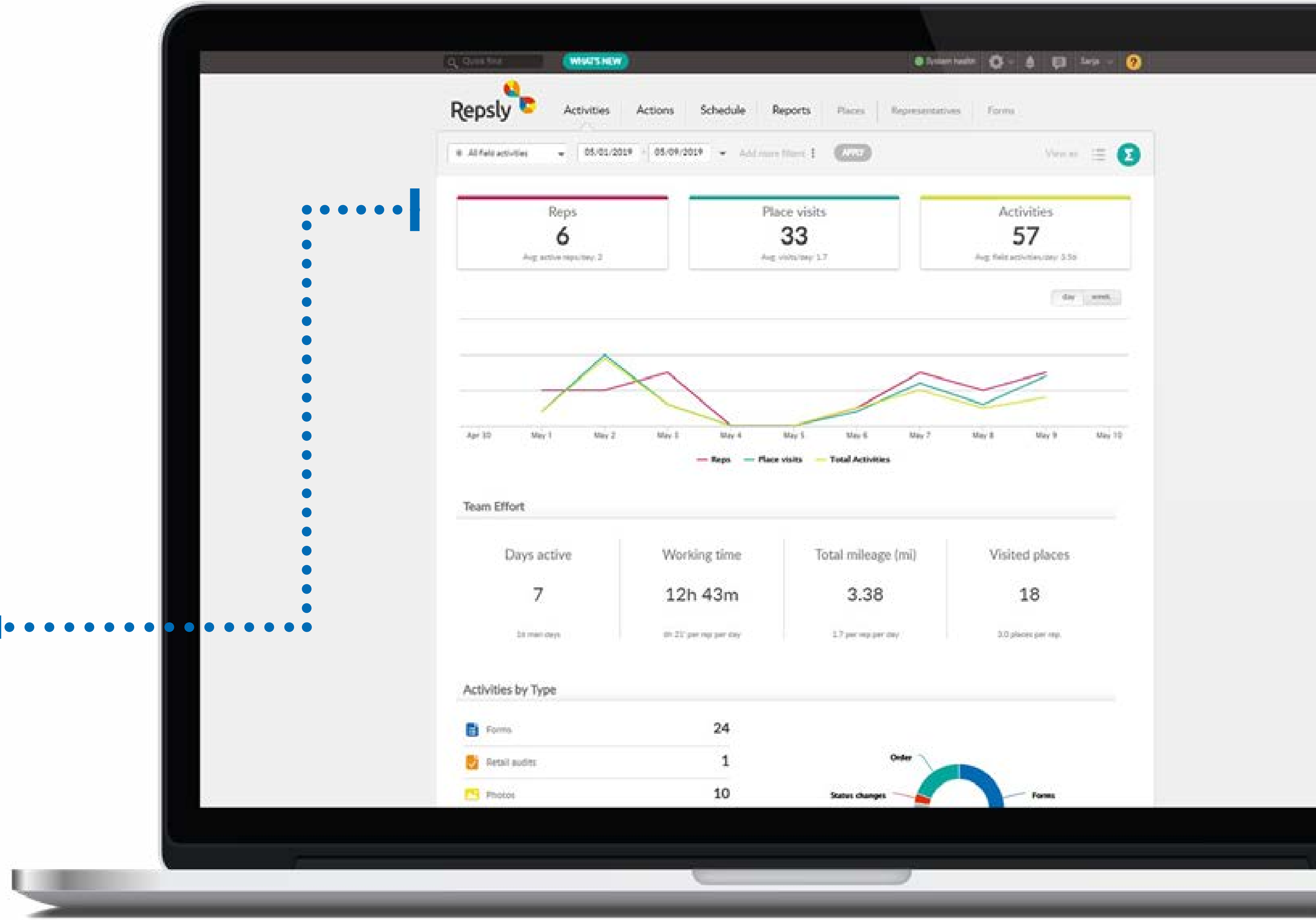
To help you get started with our communication features, please refer to our knowledge base articles:

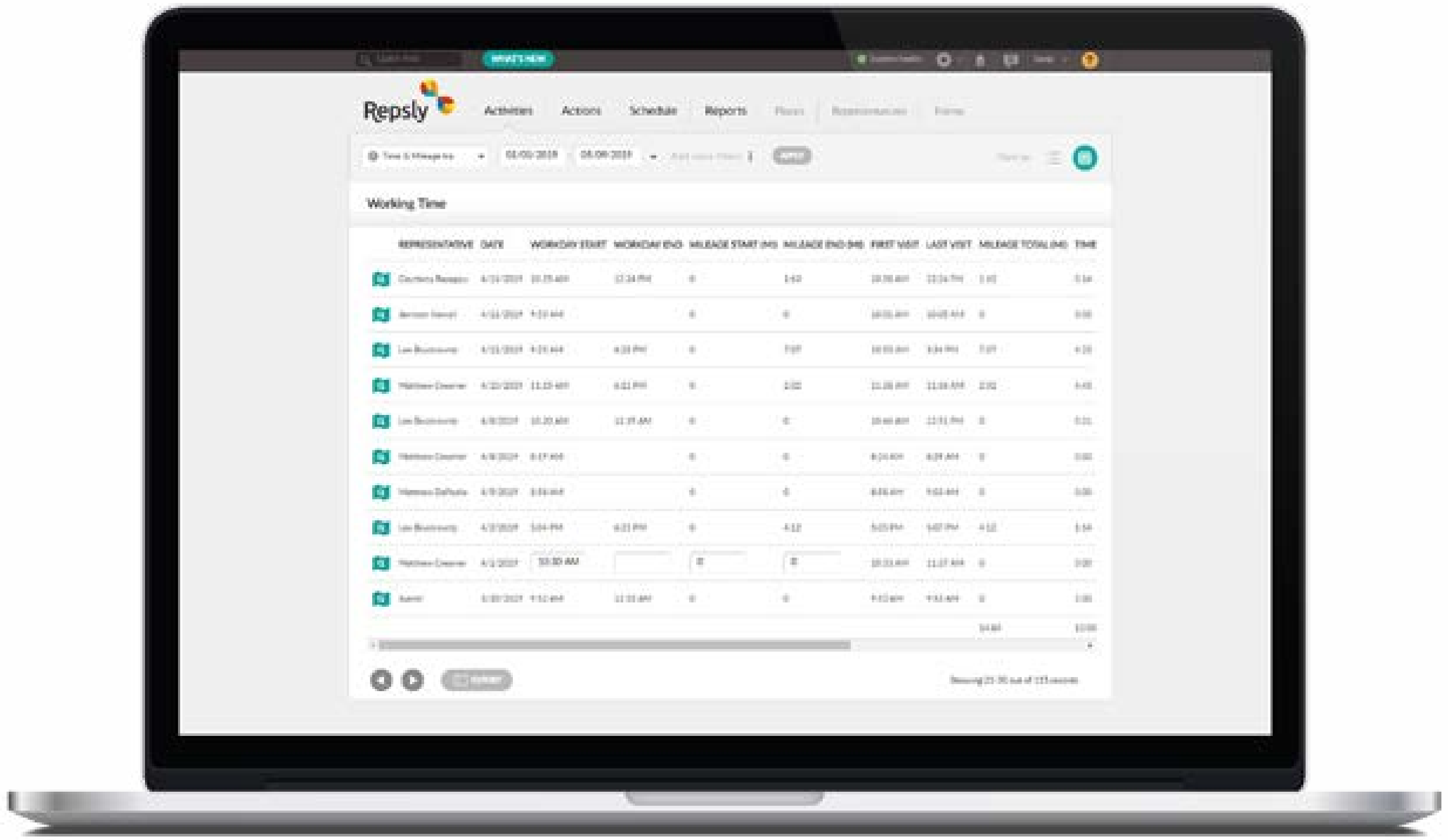
- Messaging
- Comments

LOOKING BACK ON INSIGHTS

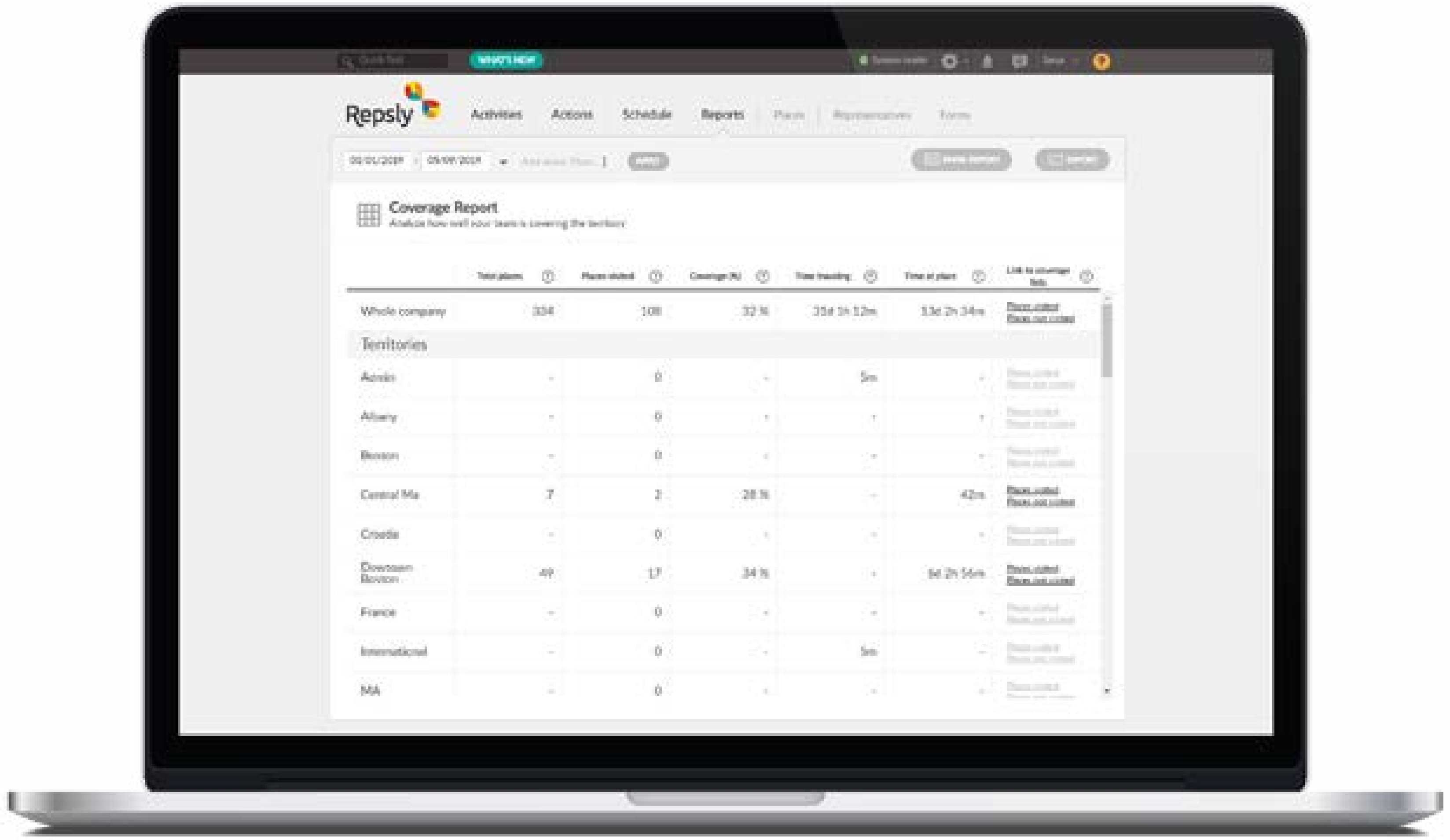
Repsly automatically turns the data your team collects in the field into flexible, digestible reports. The Reports Tab helps managers visualize their data through real-time trend analysis. Choose from several different types of pre-existing reports or create your own custom dashboard.

Summary Report gives a high-level overview of reps' activities over a period of time. This report helps you get the best value for tracking and improving your business.





With the **Time and Mileage Report**, you can: build accountability, save time and gain business insights, mostly about your productivity and account coverage.



With the **Coverage Report**, you'll have an option to analyze how well your team is covering their territory.

To help you get started with our Reports feature, please refer to our knowledge base articles:

Reports