REPRESENTATIVE TRAINING GUIDE
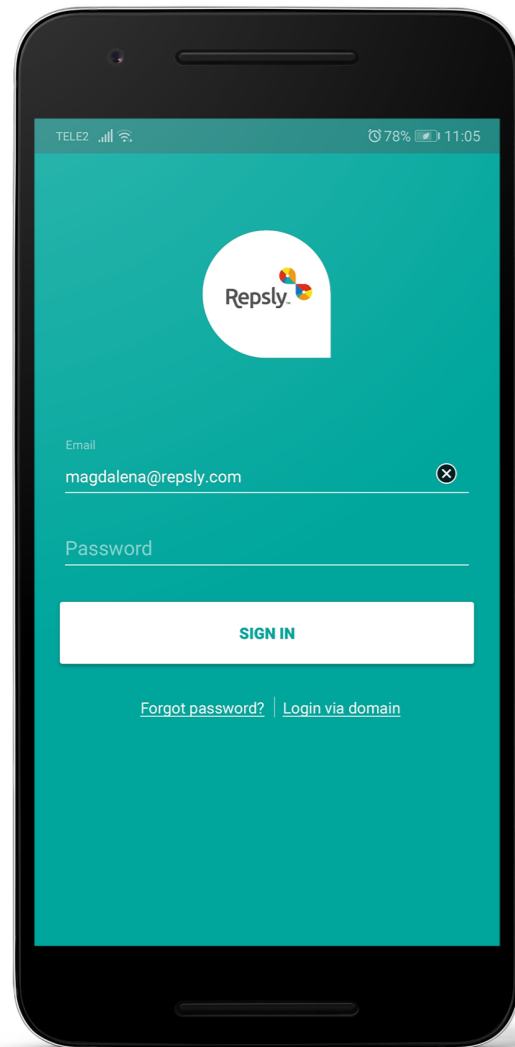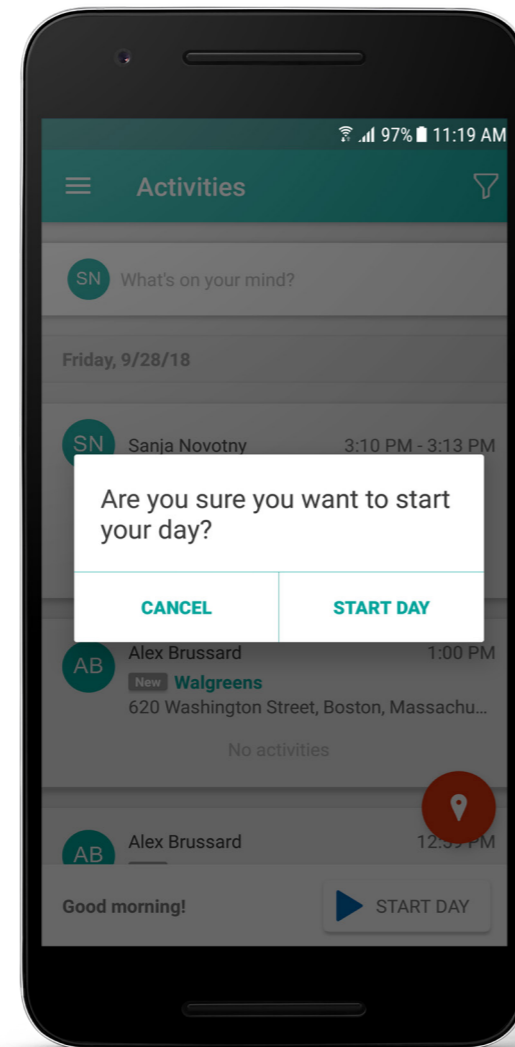
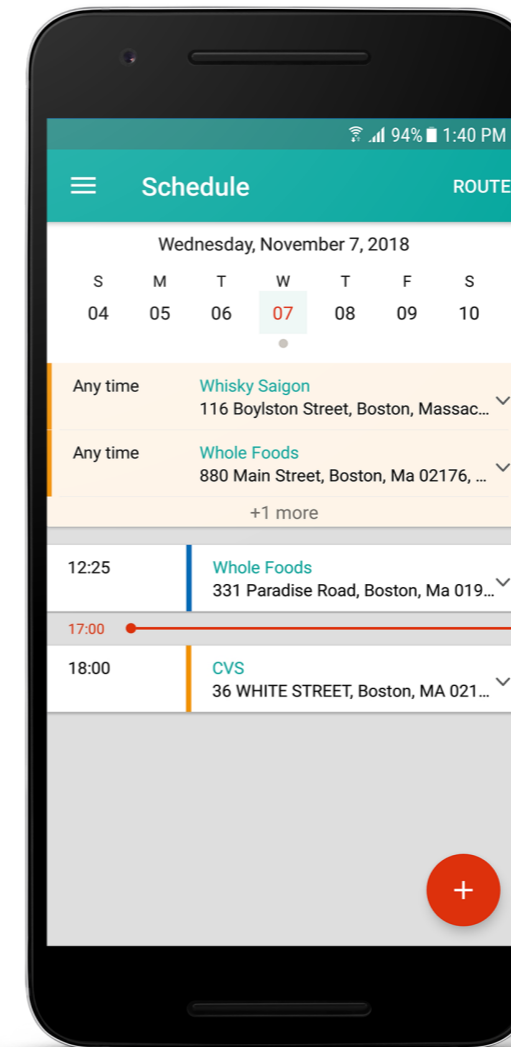## SHORT EDITON

Repsly

GETTING STARTED

HOW TO LOG IN?

(A)

1 Fill in **three key pieces of information** given to you.

2 Click on **Sign in**.
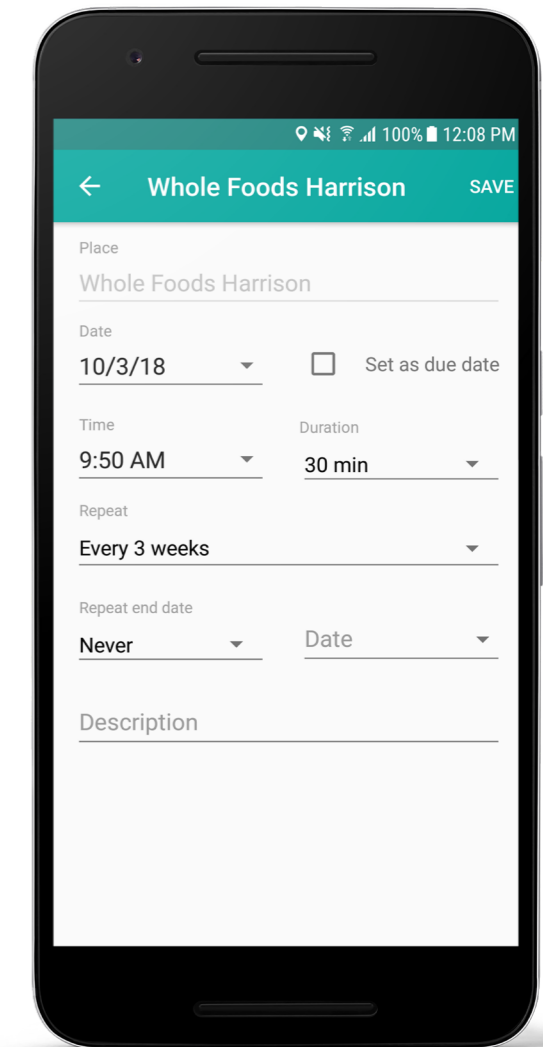
HOW TO START YOUR DAY?

(B)

1 Click on the **Start Day Button**.

2 Your day will start after clicking on **Start Day**.

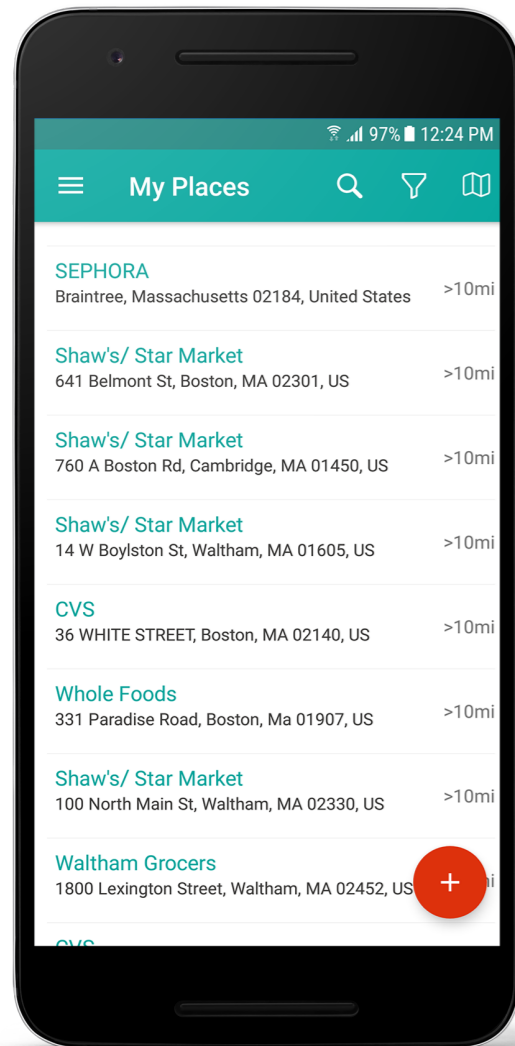## HOW TO USE SCHEDULE?

(C)

1 To see your scheduled visits, click on the **Schedule tab**.

2 To schedule a new visit, click the **red + icon**.

3 You can also, click on the **My Places tab** and select the place you wish to schedule a visit for.

4 Click the **Schedule heading** at the top of the page. Open the schedule and click the **red + icon** to schedule a new visit.
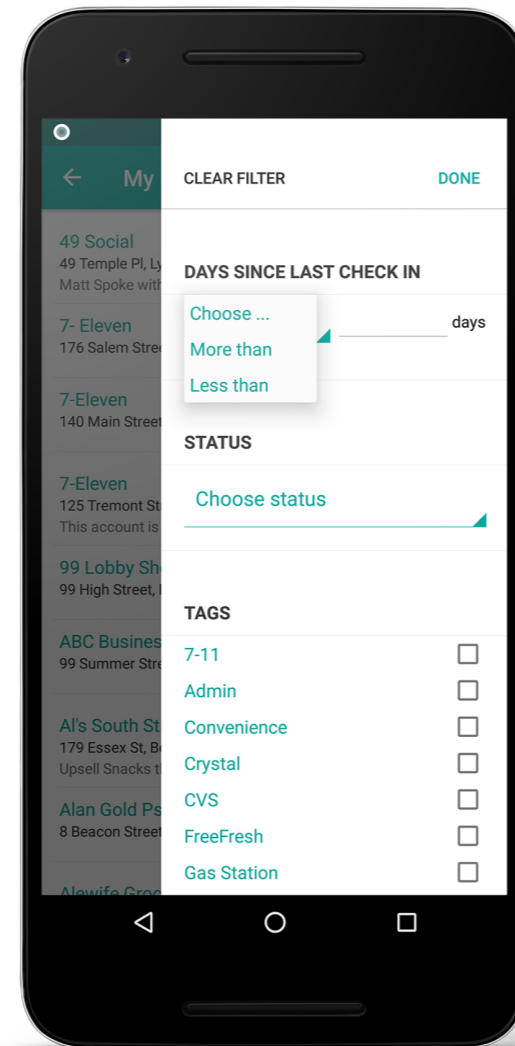
VISITING A STORE

(A) HOW TO SEE PLACE LIST?

1 Open the **Places tab** and all of your places will be listed.

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

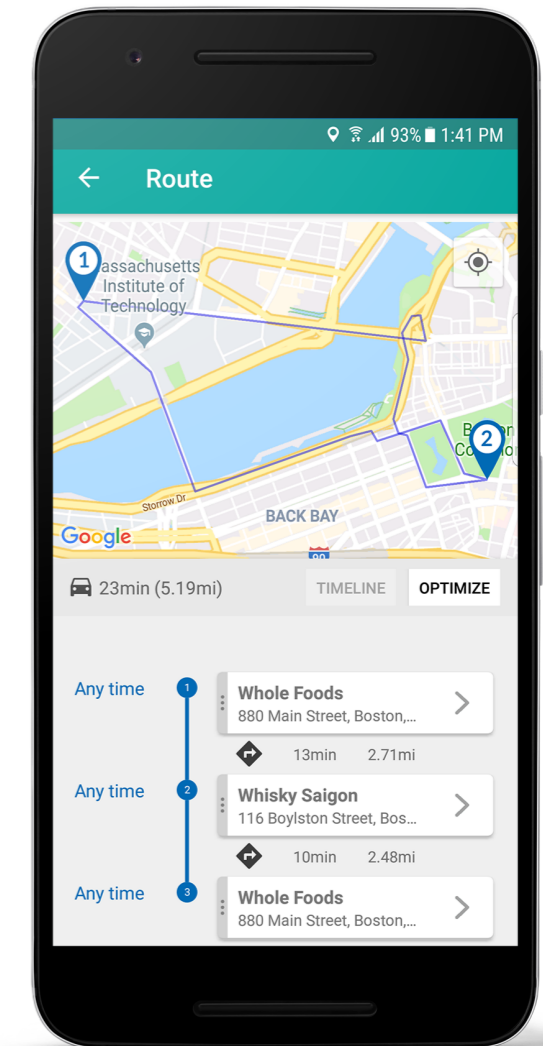## (B) HOW TO FILTER ACCOUNTS BY DAYS SINCE LAST VISIT?

1 Click on the **Places tab** and then on the filter icon.

2 Under the **"days since last check in"** click on choose. You can choose between "more than" or "less than", depending on the desired criteria.
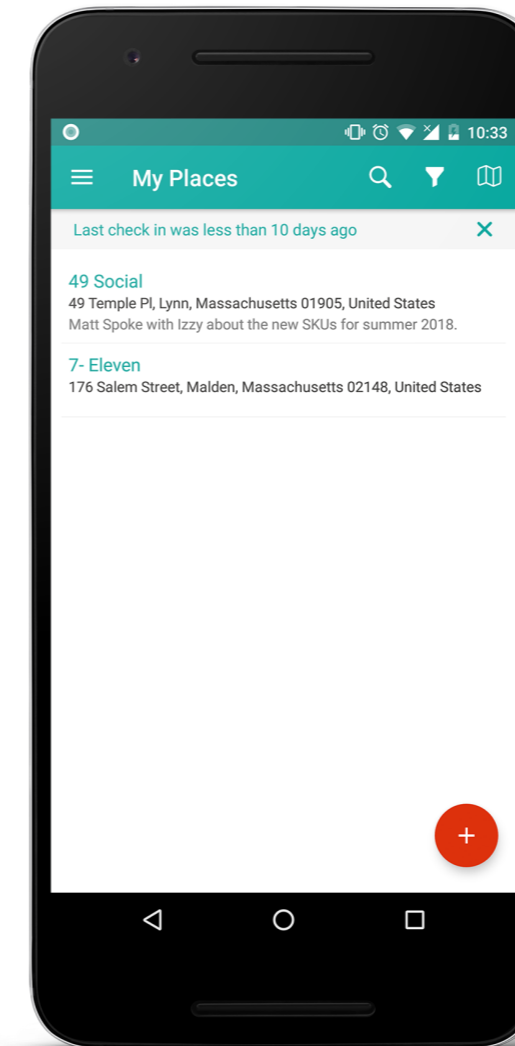
3 Once you have filtered your places, you can easily take the next steps and take action on these places.
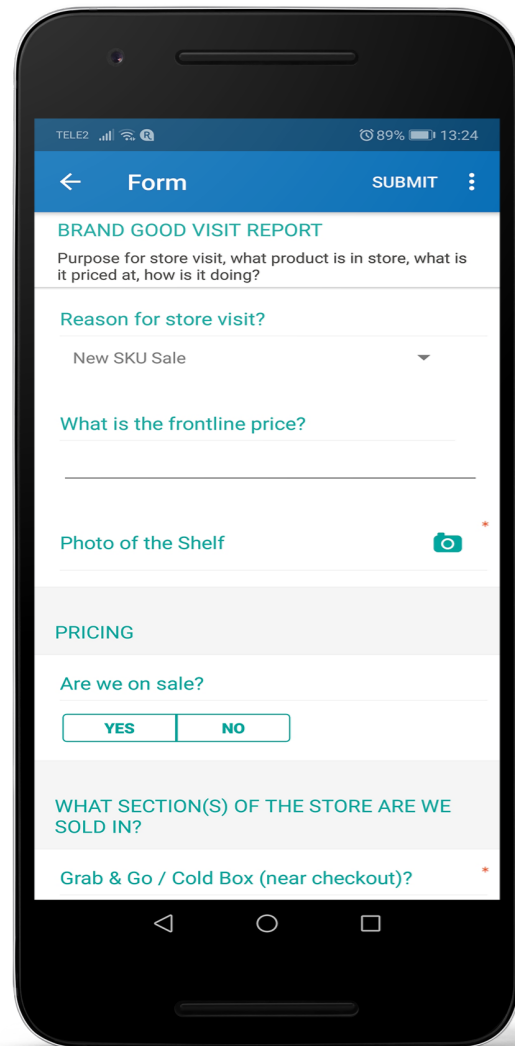
(C) HOW TO OPTIMIZE MY ROUTE?

1 On the **Schedule tab**, choose the day you want to optimize your route for. Press the **Route button**.

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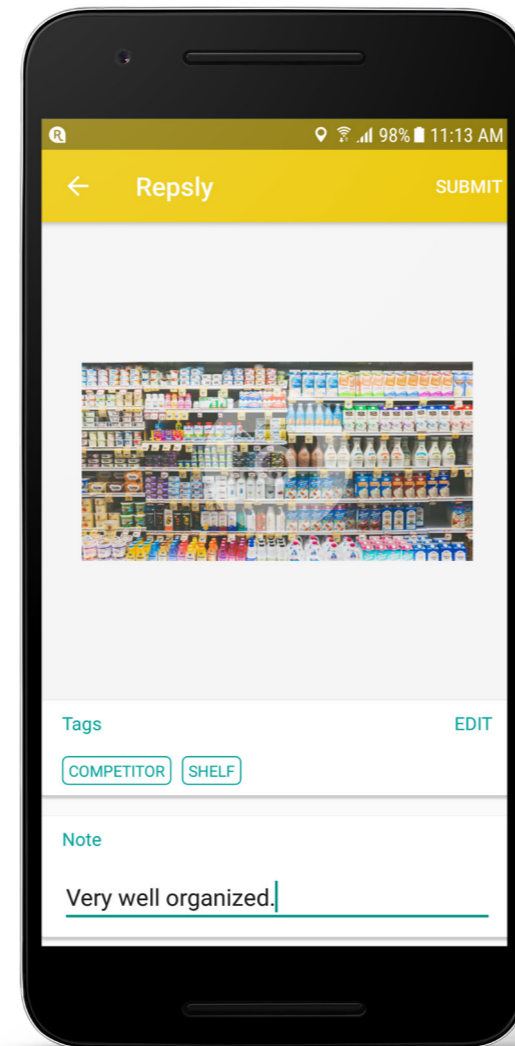
# CAPTURING INSIGHTS

A HOW TO FILL OUT A FORM?

1 Choose the place for which you wish to fill out the form.

2 Click the **Check-in icon** and select the **Form option**. Choose the appropriate form.

3 Fill out all the necessary fields on the form. Press the **Done button**.

B HOW TO TAKE A PHOTO?

1 Check into place and click on the **Photo option**.

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

3 Press the **Done button** to submit the photos.

C HOW TO TAKE A PLACE NOTE?
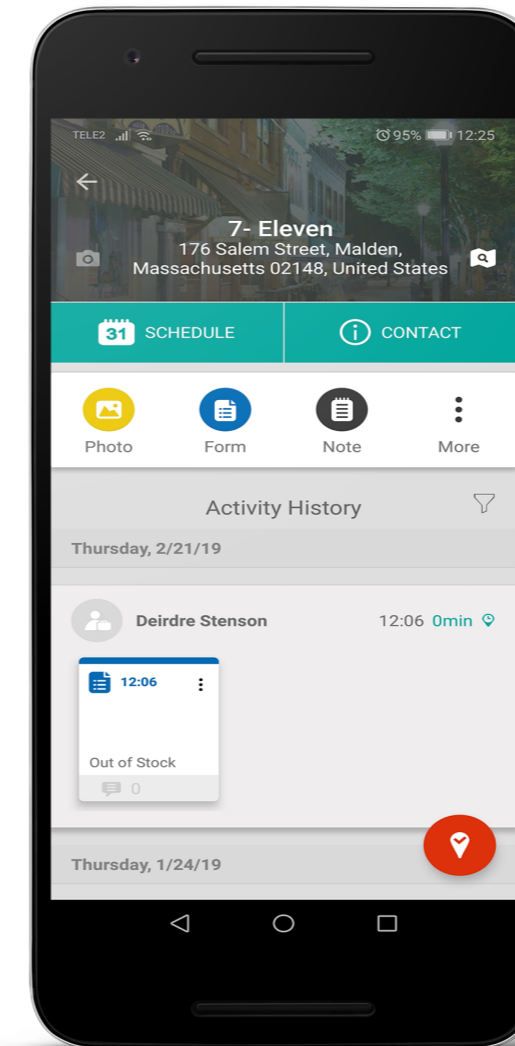
1 Check into place and click on the **Note option**.

2 Write your note and once your note is complete, click the **Submit button**.

**3** You can also edit your submitted notes by opening a note and clicking **Edit option**.

D HOW TO PLACE A PURCHASE ORDER?
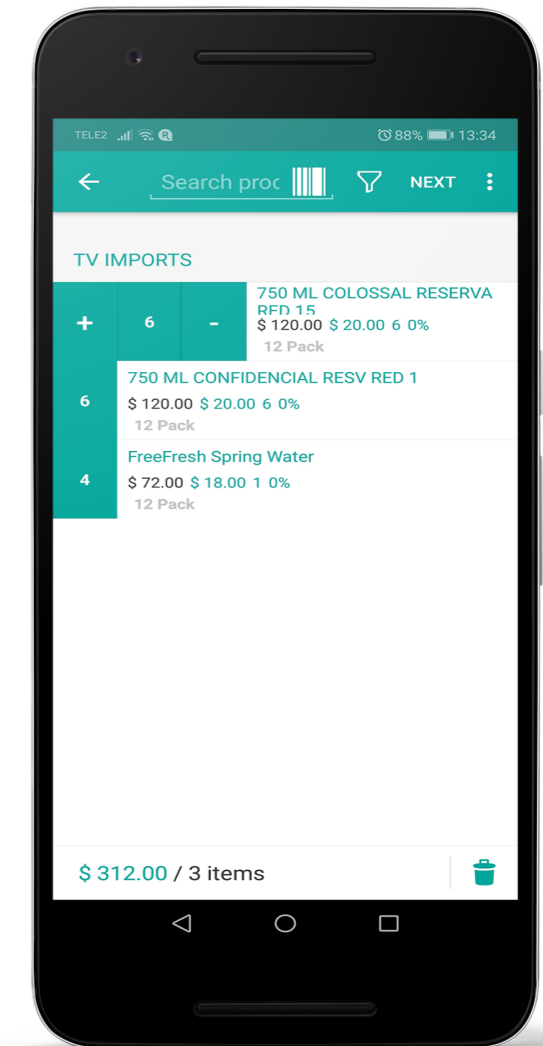
1 Check into place, tap on the **More button** and select **Order**.

2 Select the product group and enter the quantity of product in the order. Click the **Next button** to review your order.

3 If your order is correct, click the **Submit button**.

TEAM COMMUNICATION
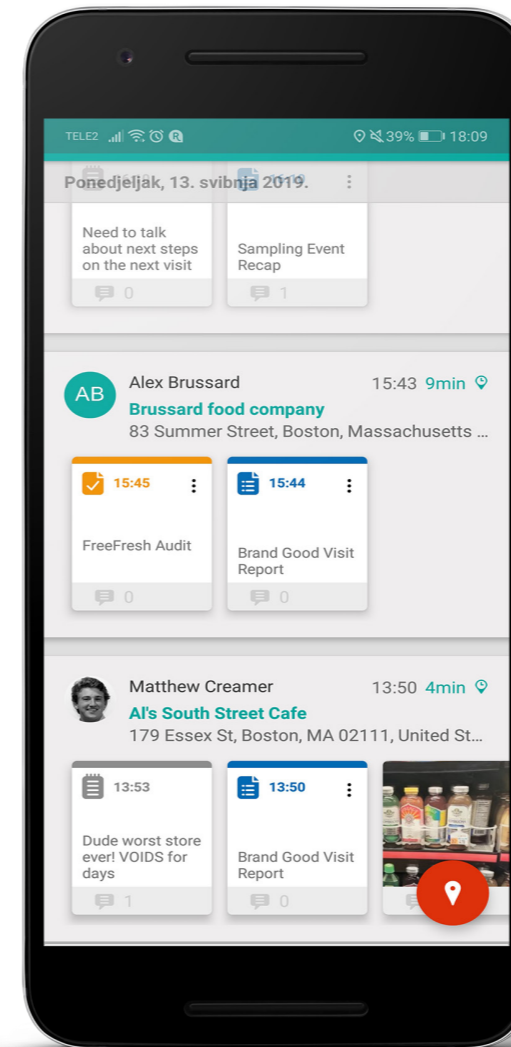
A HOW TO SEND A MESSAGE?
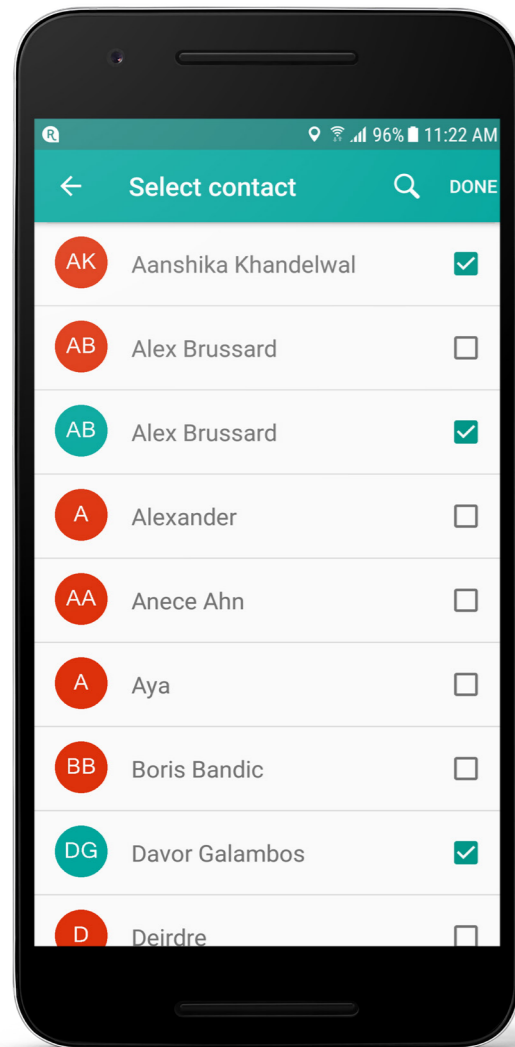
1 Find the **Messaging module** in your menu.

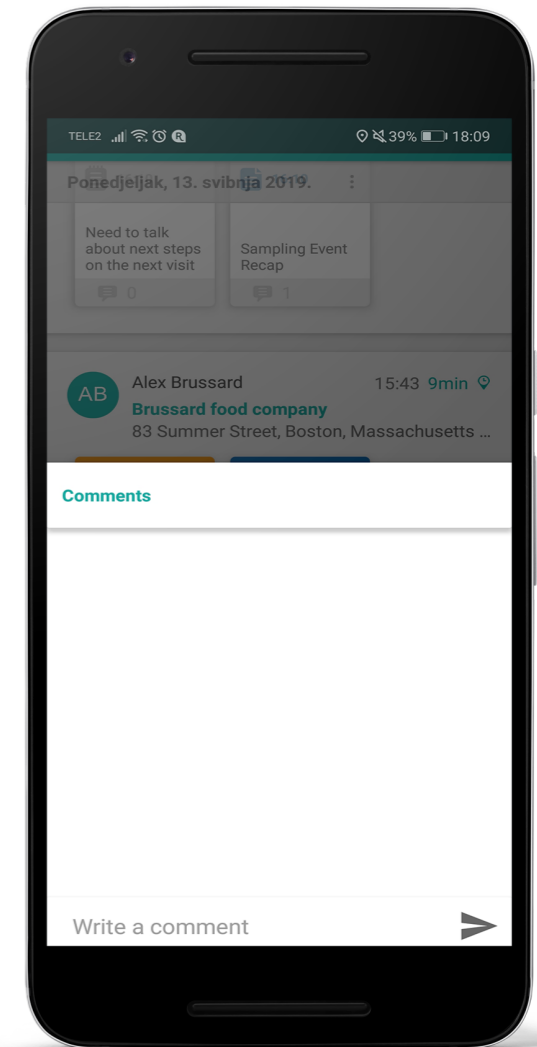**2** Create a new chat and select teammate(s).
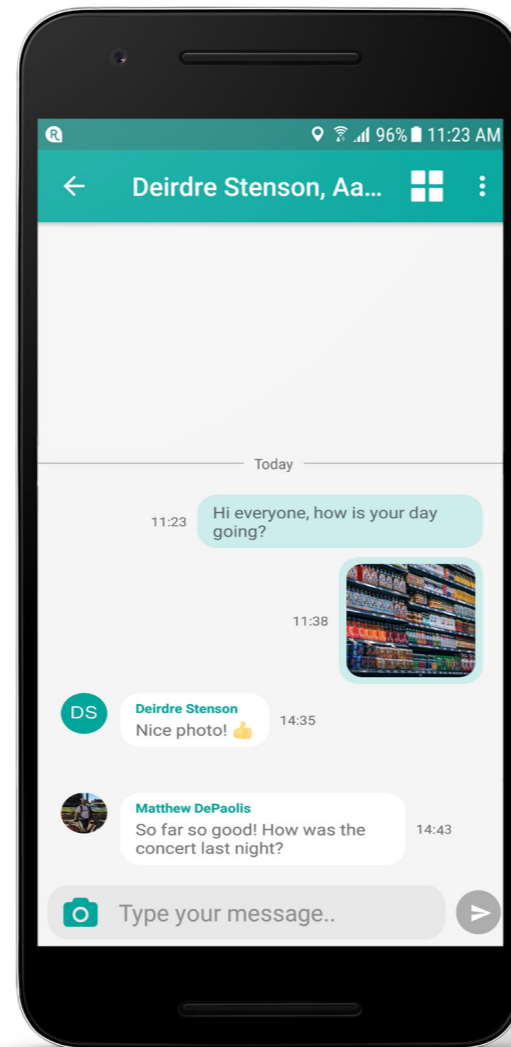
3 Type your message or choose the camera. Click **Send**.

4 Manage your group with the top right menu.
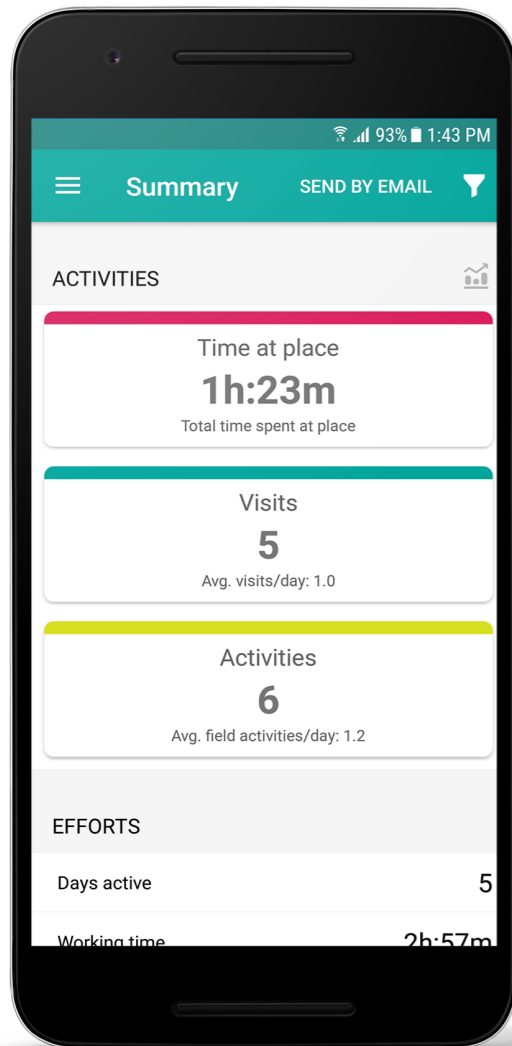
B HOW TO WRITE A COMMENT ON ACTIVITIES?

1 Click on the **Activites tab**.

2 Write your comment directly in the comment section on that activity.

3 Click **Post**. The rep who created the event will receive a copy of the comment and they will be able to reply.
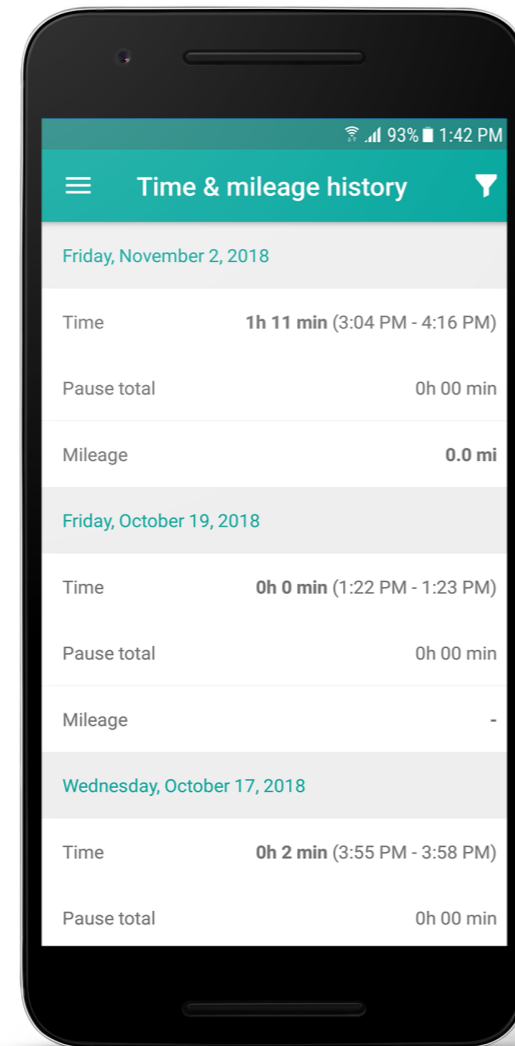
LOOKING BACK AT YOUR DAY
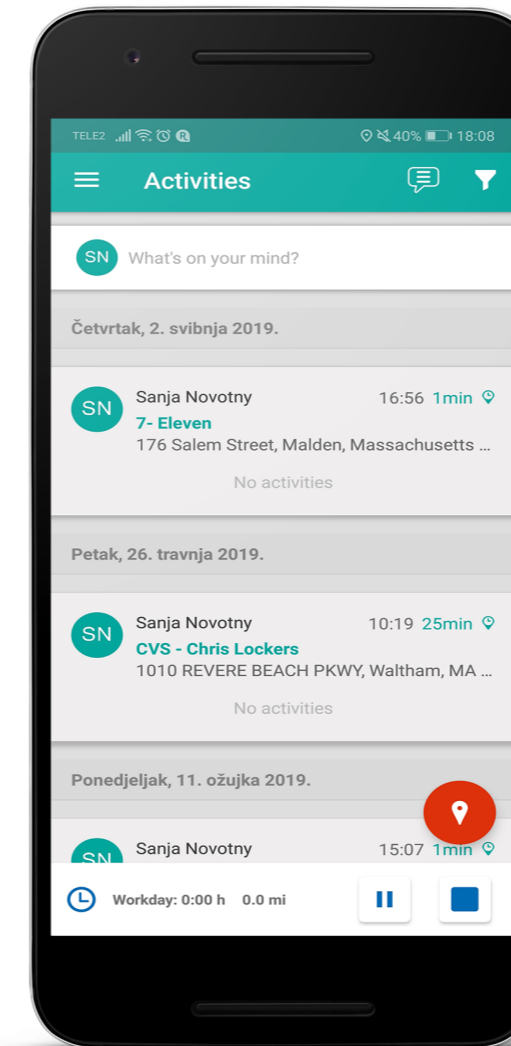
A — HOW TO VIEW A SUMMARY REPORT?

1 Open the **Summary tab**.

2 Click the **Filter button** to use filters to find specific data. Click the **Done button** to view the narrowed down report.
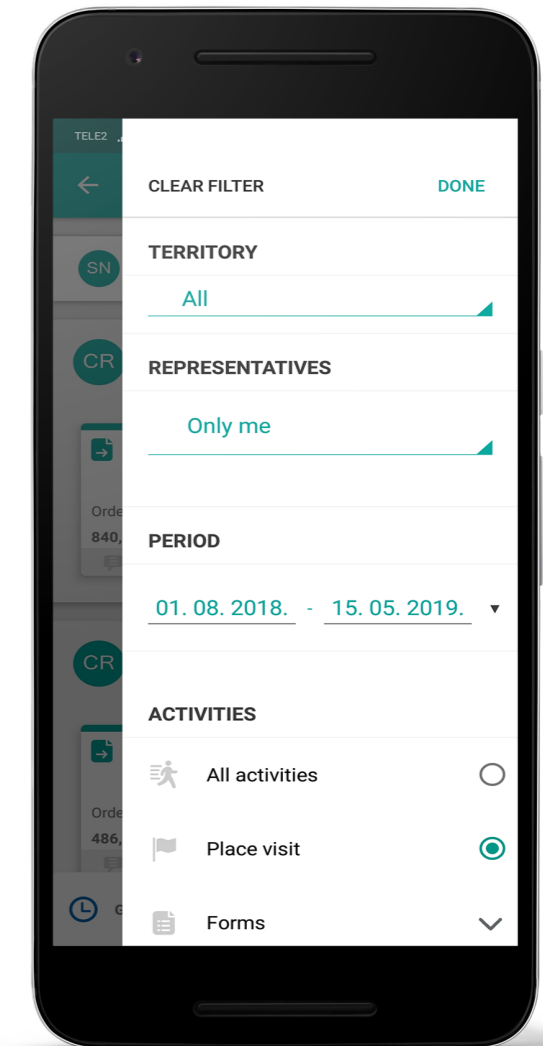
B — HOW TO VIEW TIME & MILEAGE REPORT?

1 Click on the **Time and mileage history** to see your report.

2 Use **filter option** to narrow your report base on time period.

C — HOW TO FILTER PAST ACTIVITIES?

1 Click on the **Activities tab**.

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

3 Select the date(s) for which you want to see your activities history, using the **date filter**.

4 Additionally, you can narrow down the criteria using **additional filters** (such as place or tags).