



# Product Brief for Beverage Organizations



# 1) Capture Photo Data

## At the Visit Level

Reps can take photos that apply to the whole visit. A photo of an in-store display, for example. These photos can be tagged so they can be easily grouped and searched, they can be viewed in a gallery view, and you can send a link to the gallery view. Here is an example:

[Go to a sample link you would share for the photo gallery](#)

The image displays two screenshots from the Repsly mobile application. The left screenshot shows the 'The Tea Folks' visit page. At the top, it displays the location '67 Yesterday Lane, Lewisburg, PA 17837' and a '00:00 Start visit' timer. Below the timer are two buttons: 'TAKE A PHOTO' (with a camera icon) and 'TAKE A NOTE' (with a notepad icon). A red arrow points to the 'TAKE A PHOTO' button. The bottom navigation bar includes 'Today', 'Clients', 'Messages', 'History', and 'More'. The right screenshot shows the 'Photo gallery' view, which is filtered for all reps within the date range of 1/1/2014 to 12/31/2014. It displays a grid of six photos with their respective timestamps and locations: 1. A photo of an orange bottle on a counter (10/2/2014 12:34 PM, Barnes & Nobles (M.L.T)). 2. A photo of a refrigerated display case filled with drinks (10/2/2014 10:15 AM, Good and Evil). 3. Another photo of a refrigerated display case (10/2/2014 10:15 AM, Good and Evil). 4. A photo of a refrigerated display case (10/2/2014 10:15 AM, Good and Evil). 5. A logo for 'E FFF-FRF' featuring a coffee cup and a dollar sign (10/2/2014 10:11 AM, Good and Evil). 6. A photo of a yellow bottle on a counter (10/2/2014 9:18 AM, Corner Grocers).



## Within Electronic Forms

You can also create your own electronic forms to gather whatever data you would like to have your reps collect on each visit. This includes photos that will be attached to the form. These can be viewed in several ways on the web console, and you can also send a link to these forms. Here is an example:

[Go to the sample link you would share for the list of forms](#)

●●●● AT&T 4G 9:44 AM

← Display Information DONE


\*01. Where is the display located?

Select

\*02. Other In-Store Promotions?


Select

03. Photo

Take a photo 


List of forms - "Display Information" Period: 2/26/2015 - 2/26/2015 [Hide details](#)

Date: 2/26/2016  
 Representative: Max Redman  
 Client: Merrindale's Natural Market  
 Address: 1172 Baltimore Pike Springfield, PA 19084

Show on map 

Where is the display located? Back of store






Other In-Store Promotions? yes

Photo 


Repsly Activities Representatives Clients Products SEND A MESSAGE

Display Information 2/26/2015 - 2/26/2015 Add more filters: APPLY View as: [grid icon]

Display Information  
 Filtering All reps within 2/26/2015 - 2/26/2015 Show client's additional attributes [grid icon] [share icon] [refresh icon]


| Code   | Client                  | Where is the display located? | Other In-Store Promotions? | Photo   |
|--------|-------------------------|-------------------------------|----------------------------|---|
| 100049 | Greenfield's Market     | AM Back of store              | yes                        |  |
| 100040 | The Fresh Market Destin | AM Front of store             | no                         |  |
| 100040 | The Fresh Market Destin | AM Juice Aisle                | yes                        |  |
| 100023 | Frey's Better Foods     | AM Health Foods Aisle         | no                         |  |
| 3      | Dave's Market           | AM Juice Aisle                | yes                        |  |

Date: 2/26/2016  
 Representative: Max Redman  
 Client: The Tea Folks  
 Address: 87 Yesterday Lane Lewisburg, PA 17837

Show on map 

Where is the display located? Health Foods Aisle

Other In-Store Promotions? no

Photo 



## 2) Retail Audits

Retail audits enable reps to answer a set of questions about every product on a list. If you add your product list to Repsly, you can create audits on any group of those products for your reps to fill out.

The data that the reps collect can easily be viewed in Repsly, or exported for further analysis.

### Retail audit Pivot - "Dairy Audit" Field: Product stock level    Period: 1/1/2014 - 12/31/2014

| Client code | Client                      | Address               | City                  | Landis Chocolate Milk | Landis Organic Milk |
|-------------|-----------------------------|-----------------------|-----------------------|-----------------------|---------------------|
| 100022      | Wegmans Allentown           | 3900 Tilghman Street  | Allentown, PA 18104   | 15.0000               | 20.0000             |
| 100023      | Frey's Better Foods         | 1575 Main Street      | Hellertown, PA 18055  | 12.0000               | 15.0000             |
| 100024      | Martindale's Natural Market | 1172 Baltimore Pike   | Springfield, PA 19064 | 0.0000                | 0.0000              |
| 100040      | The Fresh Market Destin     | 4495 Commons Dr. West | Destin, FL 32541      | 12.0000               | 14.0000             |
| 100049      | Greenfield's Market         | 144 Main Street       | Greenfield, MA 01301  | 14.0000               | 17.0000             |
| 419554      | BerrySpot                   | 56 Morrison Ave       | Gulftowne, MA 02514   | 25.0000               | 35.0000             |
| 817541      | Left Field Café             | 87B Andersholm Lane   | New York, NY 01547    | 15.0000               | 25.0000             |
| 857838      | Derr's                      | 197451 48th Street    | New York, NY 01247    | 12.0000               | 15.0000             |
| 223358      | Happsfield Grocers          | 87 Lucktaw Lane       | Killimet, VT 05847    | 15.0000               | 8.0000              |
| 2335654     | Mandy's Marketplace         | 1253 Trapelo Road     | Waltham, MA 02451     | 15.0000               | 20.0000             |
| 1249980     | Cherry Alley Café           | 234 Redbud Road       | New York, NY 01254    | 12.0000               | 12.0000             |

### Retail audit Raw View Period: 10/1/2014 - 12/31/2014

| Num | Client  | Date       | Retail audit | Product code | Product               | Product group | Available | Price | Stock level | Promoted | Shelf Level |
|-----|---|------------|--------------|--------------|-----------------------|---------------|-----------|-------|-------------|----------|-------------|
| 1   | Fair Shake Smoothies<br>15 Morrison Ave, Waltham, MA 02451                | 10/2/2014  | Dairy Audit  | 17           | Landis Chocolate Milk | Dairy         | True      | 2.5   | 25          | False    | Top         |
| 2   | Martindale's Natural Market<br>1172 Baltimore Pike, Springfield, PA 19064 | 10/20/2014 | Dairy Audit  | 18           | Landis Organic Milk   | Dairy         | True      | 2.5   | 16          | True     | ...         |
| 3   | Martindale's Natural Market<br>1172 Baltimore Pike, Springfield, PA 19064 | 10/20/2014 | Dairy Audit  | 17           | Landis Chocolate Milk | Dairy         | True      | 3.5   | 15          | False    | Top         |
| 4   | Martindale's Natural Market<br>1172 Baltimore Pike, Springfield, PA 19064 | 10/20/2014 | Dairy Audit  | 17           | Landis Chocolate Milk | Dairy         | True      | 4     |             | True     |             |
| 5   | Martindale's Natural Market<br>1172 Baltimore Pike, Springfield, PA 19064 | 10/20/2014 | Dairy Audit  | 18           | Landis Organic Milk   | Dairy         | True      | 5     |             | True     |             |
| 6   | Mandy's Marketplace<br>1253 Trapelo Road, Waltham, MA 02451               | 11/12/2014 | Dairy Audit  | 17           | Landis Chocolate Milk | Dairy         | True      | 4.5   | 15          | False    | Middle      |
| 7   | Mandy's Marketplace<br>1253 Trapelo Road, Waltham, MA 02451               | 11/12/2014 | Dairy Audit  | 18           | Landis Organic Milk   | Dairy         | True      | 2.5   | 20          | True     | Middle      |
| 8   | Corner Grocers<br>1 Main Street, Waltham, MA 02453, Test                  | 11/19/2014 | Dairy Audit  | 17           | Landis Chocolate Milk | Dairy         | True      | 2     | 12          | False    | Middle      |
| 9   | Corner Grocers<br>1 Main Street, Waltham, MA 02453, Test                  | 11/19/2014 | Dairy Audit  | 18           | Landis Organic Milk   | Dairy         | True      | 1.5   | 15          | True     | ...         |
| 10  | Left Field Café<br>87B Andersholm Lane, New York, NY 01547                | 12/15/2014 | Dairy Audit  | 18           | Landis Organic Milk   | Dairy         | True      | 2     | 25          | True     | Top         |
| 11  | Left Field Café<br>87B Andersholm Lane, New York, NY 01547                | 12/15/2014 | Dairy Audit  | 17           | Landis Chocolate Milk | Dairy         | True      | 2.75  | 15          | False    | Top         |
| 12  | Happsfield Grocers<br>87 Lucktaw Lane, Killimet, VT 05847                 | 12/22/2014 | Dairy Audit  | 18           | Landis Organic Milk   | Dairy         | True      | 1.25  | 8           | True     | Bottom      |
| 13  | Happsfield Grocers<br>87 Lucktaw Lane, Killimet, VT 05847                 | 12/22/2014 | Dairy Audit  | 17           | Landis Chocolate Milk | Dairy         | True      | 2.5   | 15          | False    | Bottom      |



**Export or Download**  
Export or download your activities and documents and import them to your other systems

# Export to Excel

**Client Visit list**  
Export rep visits to your clients

**Forms**  
Forms in a tabular view with extended client attributes

**Purchase Orders**  
Purchase orders with all item lines, suitable for import to backend

**Retail audits**  
Retail audits with all products, suitable for spreadsheet analysis

Please select a date range: 01/01/2014 - 12/31/2014

Retail audit:

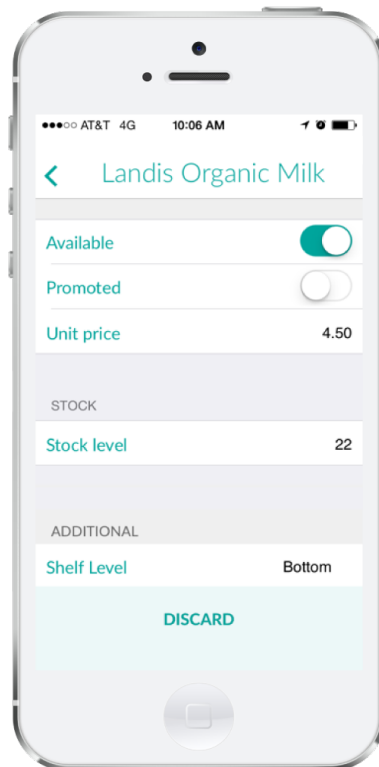
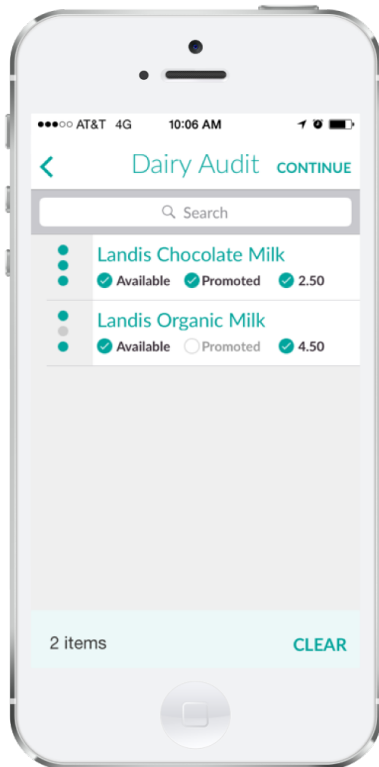
Dairy Audit

Excel

DOWNLOAD

| A1 | Date      | Product | Product Code | Product               | Represent | Client     | Client Code | Address    | City  | Zip Code | State     | Country   | Territory | Tags    | Available | Price | Stock level | Promoted | Shelf Level |
|----|-----------|---------|--------------|-----------------------|-----------|------------|-------------|------------|-------|----------|-----------|-----------|-----------|---------|-----------|-------|-------------|----------|-------------|
| 1  | 7/2/2014  | Dairy   | 17           | Landis Chi Claire Bau | 857838    | Derr's     | 197451 48   | New York   | 01247 | NY       | Northeast | new_york  | True      | 4.5000  | 12.0000   | False | Bottom      |          |             |
| 2  | 7/2/2014  | Dairy   | 18           | Landis Org Claire Bau | 857838    | Derr's     | 197451 48   | New York   | 01247 | NY       | Northeast | new_york  | True      | 4.7500  | 15.0000   | False | Middle      |          |             |
| 3  | 7/3/2014  | Dairy   | 18           | Landis Org Max Redn   | 100023    | Frey's Bet | 1575 Main   | Hellertow  | 18055 | PA       | Northeast | pennsylva | True      | 4.5000  | 15.0000   | False | Top         |          |             |
| 4  | 7/3/2014  | Dairy   | 17           | Landis Chi Max Redn   | 100023    | Frey's Bet | 1575 Main   | Hellertow  | 18055 | PA       | Northeast | pennsylva | True      | 5.0000  | 12.0000   | False | Top         |          |             |
| 5  | 7/8/2014  | Dairy   | 17           | Landis Chi Max Redn   | 100022    | Wegmans    | 3900 Tilgh  | Allentow   | 18104 | PA       | Northeast | pennsylva | True      | 5.0000  | 15.0000   | False | Top         |          |             |
| 6  | 7/8/2014  | Dairy   | 18           | Landis Org Max Redn   | 100022    | Wegmans    | 3900 Tilgh  | Allentow   | 18104 | PA       | Northeast | pennsylva | True      | 4.5000  | 20.0000   | True  | Top         |          |             |
| 7  | 7/28/2014 | Dairy   | 17           | Landis Chi Claire Bau | 419554    | BerrySpot  | 56 Morris   | Gulftown   | 02514 | MA       | New Engli | mississip | True      | 2.5000  | 25.0000   | True  | Middle      |          |             |
| 8  | 7/28/2014 | Dairy   | 18           | Landis Org Claire Bau | 419554    | BerrySpot  | 56 Morris   | Gulftown   | 02514 | MA       | New Engli | mississip | True      | 2.8000  | 35.0000   | True  | Middle      |          |             |
| 9  | 8/4/2014  | Dairy   | 17           | Landis Chi Claire Bau | 1249980   | Cherry All | 234 Redbn   | New York   | 01254 | NY       | Northeast | new_york  | True      | 2.5000  | 12.0000   | False | Middle      |          |             |
| 10 | 8/4/2014  | Dairy   | 18           | Landis Org Claire Bau | 1249980   | Cherry All | 234 Redbn   | New York   | 01254 | NY       | Northeast | new_york  | True      | 2.7500  | 12.0000   | False | Middle      |          |             |
| 11 | 8/4/2014  | Dairy   | 17           | Landis Chi Patricia N | 100040    | The Fresh  | 4495 Corn   | Destin     | 32541 | FL       | South     | florida   | True      | 2.5000  | 12.0000   | True  | Middle      |          |             |
| 12 | 8/4/2014  | Dairy   | 18           | Landis Org Patricia N | 100040    | The Fresh  | 4495 Corn   | Destin     | 32541 | FL       | South     | florida   | True      | 2.5000  | 14.0000   | False | Bottom      |          |             |
| 13 | 8/4/2014  | Dairy   | 17           | Landis Chi Claire Bau | 1630655   | Corner Gr  | 1 Main Str  | Waltham    | 02453 | MA       | Test      | New Engli | True      | 2.7500  | 24.0000   | True  | Middle      |          |             |
| 14 | 8/25/2014 | Dairy   | 18           | Landis Org Claire Bau | 1630655   | Corner Gr  | 1 Main Str  | Waltham    | 02453 | MA       | Test      | New Engli | True      | 2.5000  | 14.0000   | True  | Middle      |          |             |
| 15 | 9/23/2014 | Dairy   | 17           | Landis Chi Claire Bau | 100049    | Greenfield | 144 Main    | Greenfield | 01301 | MA       | New Engli | massachu  | True      | 2.5000  | 14.0000   | True  | Top         |          |             |
| 16 | 9/23/2014 | Dairy   | 18           | Landis Org Claire Bau | 100049    | Greenfield | 144 Main    | Greenfield | 01301 | MA       | New Engli | massachu  | True      | 2.7500  | 17.0000   | False | Top         |          |             |
| 17 | 10/2/2014 | Dairy   | 17           | Landis Chi Claire Bau | 1630654   | Fair Shake | 15 Morris   | Waltham    | 02451 | MA       | New Engli | True      | 2.5000    | 25.0000 | False     | Top   |             |          |             |
| 18 | 10/2/2014 | Dairy   | 18           | Landis Org Max Redn   | 100024    | Martindal  | 1172 Balti  | Springfiel | 19064 | PA       | Northeast | pennsylva | True      | 2.5000  | 16.0000   | True  | ...         |          |             |
| 19 | 10/20/201 | Dairy   | 17           | Landis Chi Max Redn   | 100024    | Martindal  | 1172 Balti  | Springfiel | 19064 | PA       | Northeast | pennsylva | True      | 3.5000  | 15.0000   | False | Top         |          |             |
| 20 | 10/20/201 | Dairy   | 17           | Landis Chi Max Redn   | 100024    | Martindal  | 1172 Balti  | Springfiel | 19064 | PA       | Northeast | pennsylva | True      | 4.0000  | 0.0000    | True  | ...         |          |             |
| 21 | 10/20/201 | Dairy   | 18           | Landis Org Max Redn   | 100024    | Martindal  | 1172 Balti  | Springfiel | 19064 | PA       | Northeast | pennsylva | True      | 5.0000  | 0.0000    | True  | ...         |          |             |
| 22 | 10/20/201 | Dairy   | 17           | Landis Chi Claire Bau | 2335654   | Mandy's N  | 1253 Trap   | Waltham    | 02451 | MA       | New Engli | massachu  | True      | 4.5000  | 15.0000   | False | Middle      |          |             |
| 23 | 11/12/201 | Dairy   | 18           | Landis Org Claire Bau | 2335654   | Mandy's N  | 1253 Trap   | Waltham    | 02451 | MA       | New Engli | massachu  | True      | 2.5000  | 20.0000   | True  | Middle      |          |             |
| 24 | 11/12/201 | Dairy   | 17           | Landis Chi Claire Bau | 1630655   | Corner Gr  | 1 Main Str  | Waltham    | 02453 | MA       | Test      | New Engli | True      | 2.0000  | 12.0000   | False | Middle      |          |             |
| 25 | 11/19/201 | Dairy   | 18           | Landis Org Claire Bau | 1630655   | Corner Gr  | 1 Main Str  | Waltham    | 02453 | MA       | Test      | New Engli | True      | 1.5000  | 15.0000   | True  | ...         |          |             |
| 26 | 11/19/201 | Dairy   | 18           | Landis Org Claire Bau | 1630655   | Corner Gr  | 1 Main Str  | Waltham    | 02453 | MA       | Test      | New Engli | True      | 2.0000  | 25.0000   | True  | Top         |          |             |
| 27 | 12/15/201 | Dairy   | 18           | Landis Org Claire Bau | 17541     | Left Field | 87B Ander   | New York   | 01547 | NY       | Northeast | new_york  | True      | 2.7500  | 15.0000   | False | Top         |          |             |
| 28 | 12/15/201 | Dairy   | 17           | Landis Chi Claire Bau | 17541     | Left Field | 87B Ander   | New York   | 01547 | NY       | Northeast | new_york  | True      | 2.7500  | 15.0000   | False | Top         |          |             |
| 29 | 12/22/201 | Dairy   | 18           | Landis Org Claire Bau | 223358    | Happsfie   | 87 Luckta   | Killimet   | 05847 | VT       | New Engli | vermont   | True      | 1.2500  | 8.0000    | True  | Bottom      |          |             |
| 30 | 12/22/201 | Dairy   | 17           | Landis Chi Claire Bau | 223358    | Happsfie   | 87 Luckta   | Killimet   | 05847 | VT       | New Engli | vermont   | True      | 2.5000  | 15.0000   | False | Bottom      |          |             |

## Mobile View of Retail Audits



### 3) Purchase Orders

In Repsly, back office managers can create a list of products which reps can then use to generate purchase orders from the field. Each product on the list is given a price and placed into a group, and those groups are customizable so managers can organize their product lists in whatever way makes the most sense for their business. Reps can then add products from any group to each order, and the total value of that order will be calculated automatically based on the prices of those products.

**Products**  
Define products that you use in your organization

+ NEW PRODUCT

Search products Add more filters APPLY View as: Plain list

| Product code | Product                       | Price | Active |
|--------------|-------------------------------|-------|--------|
| 21           | Aquarith Water                | 19.00 | ✓      |
| 31           | Blueberry Lime Soda Juices    | 2.11  | —      |
| 27           | Chocolate Shake Juices        | 2.15  | —      |
| 24           | FlavorBurst Crazy Cher Juices |       |        |
| 26           | FlavorBurst Insane Aca Juices |       |        |
| 23           | FlavorBurst Loony Lem Juices  |       |        |
| 25           | FlavorBurst Mad Mang Juices   |       |        |
| 22           | Freefresh Water               |       |        |
| 19           | Fruit Punch Surprise Juices   |       |        |
| 13           | Gingorange Refresh Juices     |       |        |

**Add groups, change sort or deactivate them**

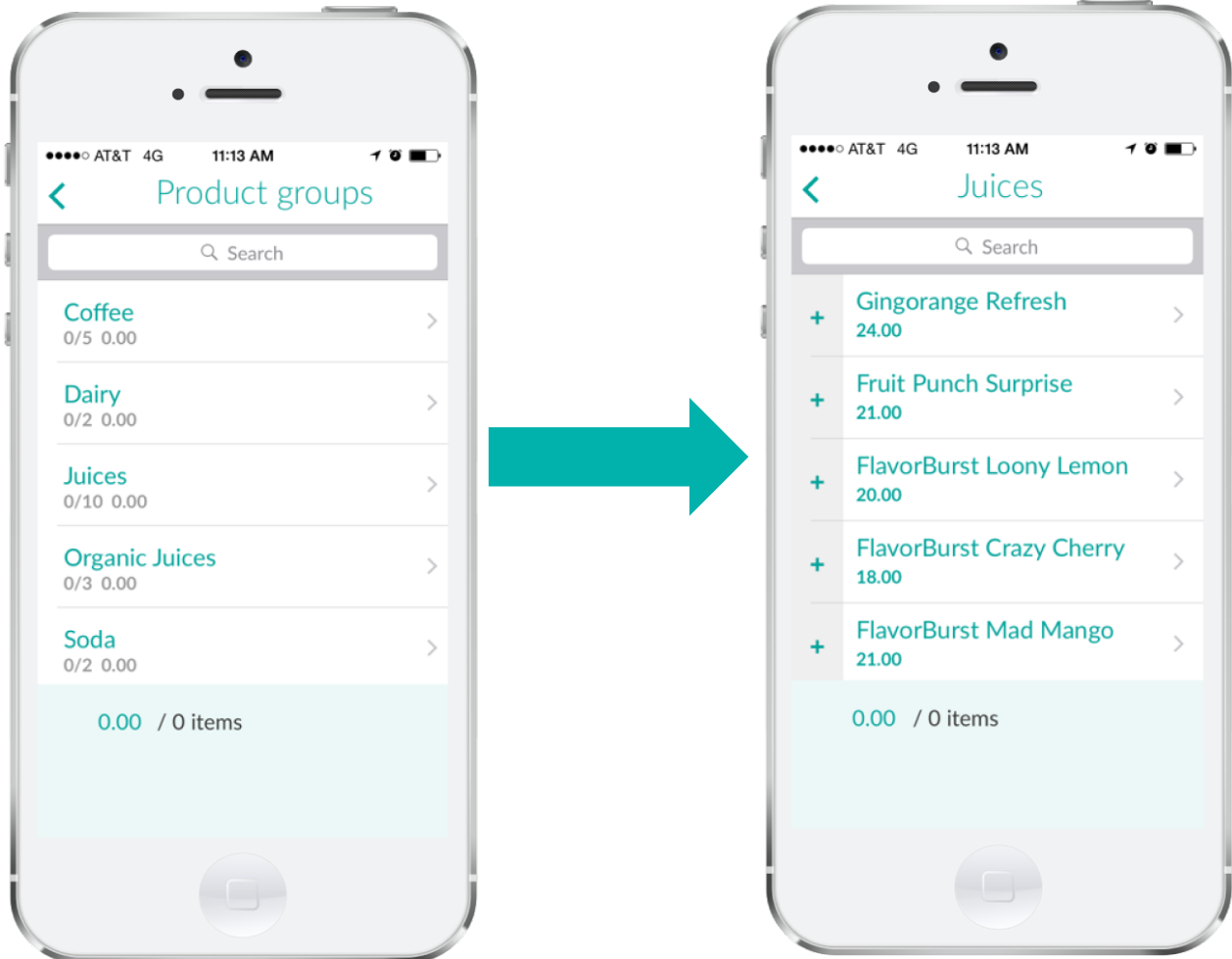
| Code | Product group  | Is active |
|------|----------------|-----------|
| TEA  | Tea            | ✓         |
| ORG  | Organic Juices | ✓         |
| JUC  | Juices         | ✓         |
| SOD  | Soda           | ✓         |
| COF  | Coffee         | ✓         |
| DAY  | Dairy          | ✓         |
| WAT  | Water          | ✓         |
| BEER | Beer           | ✓         |
| WINE | Wine           | ✓         |

Code Add new group and press enter +

Save customization Cancel



## Mobile View of Purchase Orders



## 4) Customizable Electronic Forms – with signature capture

With Replsly you can create as many custom forms as you would like, with an unlimited number of questions on them. Forms can include photos, yes/no questions, dropdowns, free text, and other field types. You can create, edit, and deploy them on your own in minutes.



### Forms

Use forms to keep record of your reps activities.

Title:

Display Information

active form

Auto-fill on open

Description:

...

Create and Edit forms

### Questions & input fields

Where is the display located? MANDATORY

Front of store

Back of store

Juice Aisle

Health Foods Aisle

Other

+ ADD ANSWER

Other In-Store Promotions? MANDATORY

Photo MANDATORY

+ Add new field



### Prepare custom forms

Easily customize the data which will be collected in the field. Define input type (text, numeric, yes/no, selection).



# < Display Information DONE

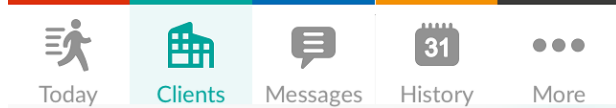
\*01. Where is the display located?

Front of store

\*02. Other In-Store Promotions?

no

\*03. Photo



Deploy for your reps to gather data

See and Share the results

**Display Information**

Client: City Java and News  
 Address: 502 Craven Street Beaufort, SC 29902  
 Representative: Patricia Nook  
 Description: Display Information

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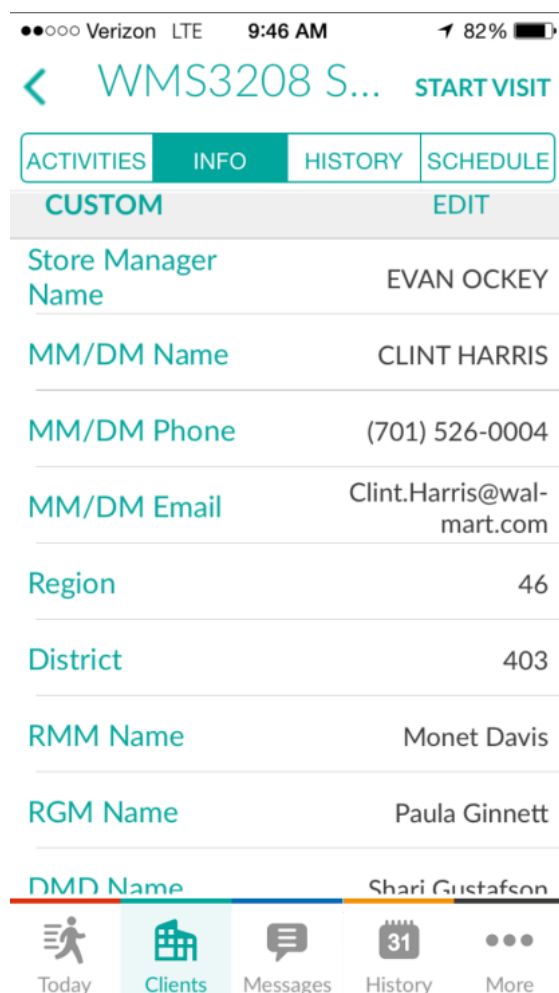
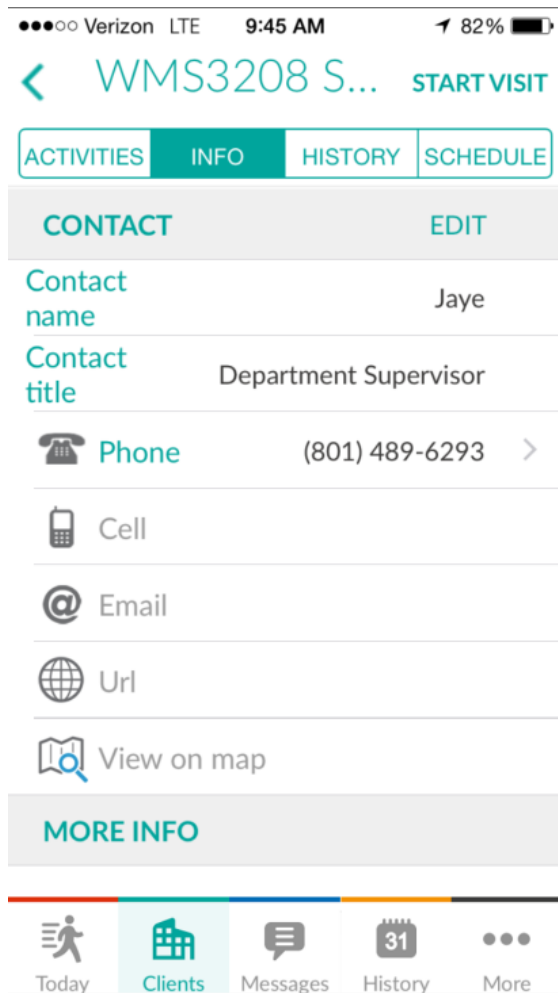
Where is the display located? Front of store  
 Other In-Store Promotions? no

Photo



## 5) Completely Customizable Customer Info

Repsly allows you to tailor the information about your customers that you maintain and share it with your field reps to include exactly what is important for your business. Reps have all pertinent information about each of their stores at their fingertips at all times, including contact, demographic, and business details, and anything else that they need to know in order to complete their work effectively.



## 6) Scheduling Visits

Repsly gives managers and reps the power to schedule visits at particular clients for particular dates and times. Visits can be set to recur every one or more weeks, to ensure clients are being checked up on regularly and nobody is being missed. Notes can also be added to each scheduled visit if there are specific activities that need to be completed or questions that need to be answered. From the backoffice, managers can see whether or not their reps are completing the visits on their respective schedules, and can look at the details of visits completed in the past. Reps can see all of this information from their mobile apps as well.

**Claire Baum**

Representative info Report Schedule

March 2015

month week day agenda

| SUN  | MON  | TUE                    | WED                              | THU                   | FRI  | SAT  |
|------|------|------------------------|----------------------------------|-----------------------|--|------|
| + 1  | + 2  | + 3<br>Adburg Markets  | + 4                              | + 5                   | + 6<br>Frey's Better Foods<br>Dave's Market  | + 7  |
| + 8  | + 9  | + 10<br>Adburg Markets | + 11<br>The Fresh Market Pens... | + 12                  | + 13<br>Dave's Market                        | + 14 |
| + 15 | + 16 | + 17                   | + 18                             | + 19                  | + 20<br>Frey's Better Foods<br>Dave's Market | + 21 |
| + 22 | + 23 | + 24                   | + 25                             | + 26<br>Dave's Market | + 27   | + 28 |
| + 29 | + 30 | + 31                   | + 01                             | + 02                  | + 03   | + 04 |

AT&T 4G 10:12 AM

The Fresh Ma... START VISIT

ACTIVITIES INFO HISTORY SCHEDULE

m t w t f s s

26 27 28 29 30 31 01

02 03 04 05 06 07 08

09 10 11 12 13 14 15

16 17 18 19 20 21 22

23 24 25 26 27 28 01

02 03 04 05 06 07 08

VISITS

February 26, 2015, Patricia Nook

0 2 0 0 0

Today Clients Messages History More

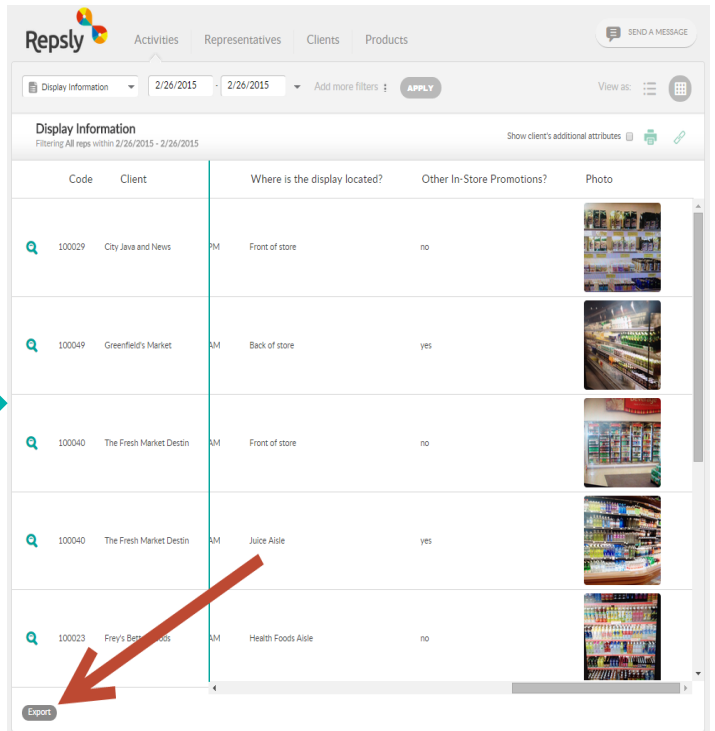
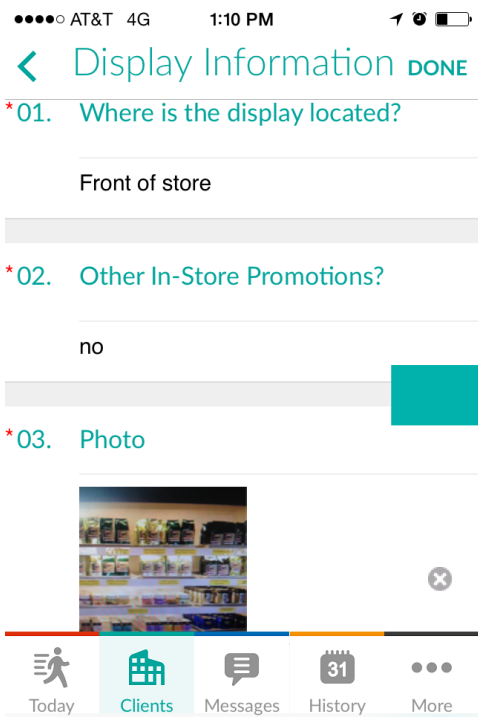


# 7) Exporting Data from Repsly

Repsly provides a very flexible and adaptable way to gather data from the field, and makes that data available in an easy to view format on the web. Repsly also provides several ways to easily export and share data for further analysis.

## Export data collected on electronic forms directly from the tabular view

Photos are exported as links to the photo



| Representative | Code               | Client               | Street Ad/Zip Code | City       | State | Date      | Longitude/Latitude  | Visit Start/Visit End | Where is the display located? | Other In-Store Promotions? | Photo  |
|----------------|--------------------|----------------------|--------------------|------------|-------|-----------|---------------------|-----------------------|-------------------------------|----------------------------|--|
| pnook          | Patricia N\100029  | City Java #502 Crave | 29902              | Beaufort   | SC    | 2/26/2015 | -71.05686;42.344955 | 2/26/2015 2/26/2015   | Front of store                | no                         | https://salespodphotos1.s3.amazonaws.com/d60bb986-e423-442d-   |
| cbaum1         | Claire Bau\100049  | Greenfield 144 Main  | 01301              | Greenfield | MA    | 2/26/2015 | -71.05675;42.350013 | 2/26/2015 2/26/2015   | Back of store                 | yes                        | https://salespodphotos1.s3.amazonaws.com/5d83a5f7-81e2-42e2-9- |
| pnook          | Patricia N\100040  | The Fresh 4495 Com   | 32541              | Destin     | FL    | 2/26/2015 | -71.05686;42.344955 | 2/26/2015 2/26/2015   | Front of store                | no                         | https://salespodphotos1.s3.amazonaws.com/c6c46f3e-18b8-4b94-1- |
| pnook          | Patricia N\100040  | The Fresh 4495 Com   | 32541              | Destin     | FL    | 2/26/2015 | -71.05686;42.344955 | 2/26/2015 2/26/2015   | Juice Aisle                   | yes                        | https://salespodphotos1.s3.amazonaws.com/30fb53aa-c8c3-4606-a- |
| mredman        | Max Redr\100023    | Frey's Bet 1575 Main | 18055              | Hellertown | PA    | 2/26/2015 | -71.05686;42.344955 | 2/26/2015 2/26/2015   | Health Foods Aisle            | no                         | https://salespodphotos1.s3.amazonaws.com/df51aa82-727c-4472-a- |
| cbaum1         | Claire Bau\1630655 | Dave's Ma 415 South  | 02030              | Waltham    | MA    | 2/26/2015 | -71.05623;42.348900 | 2/26/2015 2/26/2015   | Juice Aisle                   | yes                        | https://salespodphotos1.s3.amazonaws.com/9f94942c-9331-44ba-4- |
| cbaum1         | Claire Bau\1630655 | Corner Gr 1 Main Str | 02453              | Waltham    | MA    | 2/26/2015 | -71.05796;42.350456 | 2/26/2015 2/26/2015   | Front of store                | no                         | https://salespodphotos1.s3.amazonaws.com/f4336656e-eb4b-4c75-  |
| mredman        | Max Redr\233221    | The Tea F 67 Yester  | 17837              | Lewisburg  | PA    | 2/26/2015 | -71.05686;42.344955 | 2/26/2015 2/26/2015   | Health Foods Aisle            | no                         | https://salespodphotos1.s3.amazonaws.com/6c3b34c4-c393-4998-f- |
| mredman        | Max Redr\100024    | Martindal 1172 Balti | 19064              | Springfiel | PA    | 2/26/2015 | -71.05686;42.344955 | 2/26/2015 2/26/2015   | Back of store                 | yes                        | https://salespodphotos1.s3.amazonaws.com/408c6681-9300-4bee-   |
| cbaum1         | Claire Bau\1630654 | Fair Shake 15 Morris | 02451              | Waltham    | MA    | 2/3/2015  | -71.24394;42.413036 | 2/3/2015 12/3/2015    | Back of store                 | yes                        | https://salespodphotos1.s3.amazonaws.com/c2be23be-ctcb-4baa-   |

Export to Excel



## Export bulk data for Visits, Forms, Orders and Audits for any date range through the data Export/Download function

**Repsly** Representatives Clients Products SEND A MESSAGE

### Export or Download

Export or download your activities and documents and import them to your other systems

**Client Visit list**  
Export rep visits to your clients

Please select a date range: 12/17/2014 - 12/17/2014

Representative: - All reps -

Excel **DOWNLOAD**

**Forms**  
Forms in a tabular view with extended client attributes

**Purchase Orders**  
Purchase orders with all item lines, suitable for import to backend

**Retail audits**  
Retail audits with all products, suitable for spreadsheet analysis

#### Using Export in Repsly

Use Exports to process data in a spreadsheet, do your backup or import data into your backend system.

You can export all lists in Repsly, like a list of clients, products, or activities like forms or notes. To do that simply use **Export** button next to **Show All** button. [View example](#)

**Export**

Custom exports that aren't available as a list in the app, but you might need them for other purposes, can be found here.

# Send links to web viewable Orders, Audits, Photo Galleries, etc.

Repsly Activities Representatives Clients Products SEND A MESSAGE

Photos 1/1/2014 - 12/31/2014 Add more filters APPLY View as

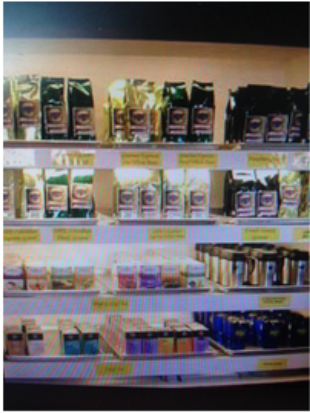
Photo gallery  
Filtering All reps within 1/1/2014 - 12/31/2014

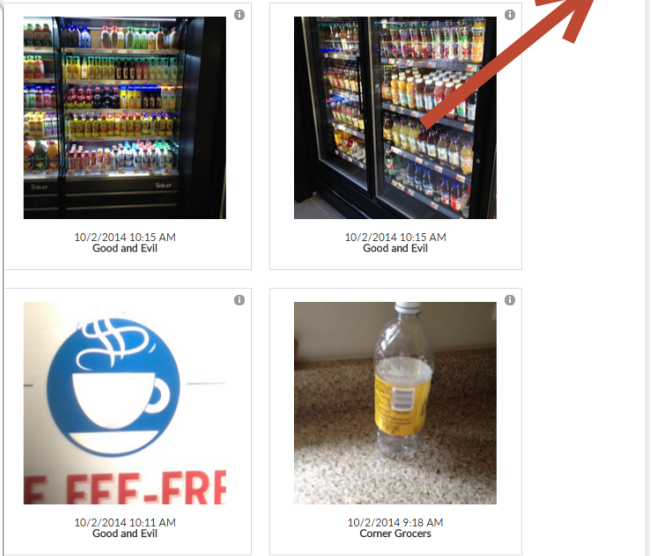
**Display Information**

Client: City Java and News  
Address: 502 Craven Street Beardon 29902  
Representative: Patricia Nook  
Description: Display Information

Where is the display located? Front of store  
Other In-Store Promotions? no

Photo





10/2/2014 10:15 AM Good and Evil

10/2/2014 10:15 AM Good and Evil

10/2/2014 10:11 AM Good and Evil

10/2/2014 9:18 AM Corner Grocers

**Dairy Audit**

Client: Happsfield Grocers  
Address: 87 Lucktaw Lane Killimet, VT 05847  
Time: 12/22/2014 11:39:46 AM  
Representative: Claire Baum

| Num | Product               | Available | Price | Stock level | Promoted | Shelf Level |
|-----|-----------------------|-----------|-------|-------------|----------|-------------|
| 1   | Landis Organic Milk   | ✓         | 1.25  | 8           | ✓        | Bottom      |
| 2   | Landis Chocolate Milk | ✓         | 2.5   | 15          | —        | Bottom      |





# Repsly Feature Summary

## Repsly Feature Summary

- Full Featured Web Console for Managing Rep Activity and the Data that Reps Collect
- Modern, Intuitive mobile apps for all current iOS and Android devices
- GPS Tracking of all mobile activities
- Check-In & Check-Out of store visits
- Start and End Day: time and mileage for time card functionality
- Replenishment Ordering
- Visit History on Mobile – See every photo, form, audit, note and order ever completed at any store
- Full Functionality of Mobile even with no Cell Coverage
- Google Maps integration on Mobile to see & navigate to store locations
- Completely customizable electronic forms with signature capture
- Retail Audits: Price, Availability, Stock/Inventory Level and an unlimited number of custom fields efficiently captured against a list of products
- Purchase Orders created in the field based on back office product list
- Visit scheduling – Create schedules by reps and by stores
- Data ‘Slice & Dice’ filtering by:

- Activity Type
- Territory
- Date
- Rep
- Store
- Tag

- Complete Customer (Store) data management. Create unlimited custom fields, tags and territories
- Complete Store & Rep history
- Rep Rankings Report
- Activity Summary Reports
- One click exporting of form, order, and audit data
- Ability to easily share links to custom photo galleries, filtered forms and orders
- One-click switch between Map/Activity Stream and Report view of activities
- Messaging between reps and back-office users
- Automated activity reports emailed to managers

### Scheduled Updates (Jan – March '15)

- Visit Stream – Activities consolidated in a modern ‘Visit-Based’ view
- Rep’s ability to email forms, photos and orders from the mobile device
- Open API for 2-way integration to back office systems





# The Repsly Manager's Console

The screenshot displays the Repsly Manager's Console interface. At the top, there is a navigation bar with the Repsly logo and tabs for "Representatives", "Clients", and "Products". A "SEND A MESSAGE" button is located on the right. Below the navigation bar, there are filters for "All field activities", dates "12/16/2014" to "12/16/2014", and an "APPLY" button. A "View as:" dropdown is also present. The main area features a map of Worcester, MA, with several red location pins. A summary box on the right of the map shows statistics for the date range "12/16/2014-12/16/2014": Active reps: 2, Visits: 6, Activities: 24, and a total amount of \$0.00. Below the map, a list of activities is shown, all performed by Matt Creamer:

- 5:10 PM: WORKDAY END: 5:10 PM, Mileage 2.522
- 4:23 PM: WINTER AUDIT at Walmart 255, 25 Tobias Boland Way, Worcester, Ma 01607
- 4:21 PM: VISIT REPORT at Walmart 255, 25 Tobias Boland Way, Worcester, Ma 01607
- 4:20 PM: PHOTO at Walmart 255, 25 Tobias Boland Way, Worcester, Ma 01607

The last activity includes the hashtag #Inside.

