



# Product Brief for Third Party Merchandising Organizations





Repsly enables organizations to improve the efficiency of their field teams, and greatly simplifies the collection and analysis of field data. As a result, Repsly's solution helps organizations create a tight connection between the field and back-office operations. Specifically, Repsly is by far the world's greatest software for third party merchandising companies. This product brief explores how a third party merchandising organization can take advantage of all that Repsly has to offer.

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## Collect Data

Capture photos, forms, audits, signatures, and orders easily on the go with the Repsly mobile app

# 1) Retail Audits

Repsly allows back-office managers to control the data reps collect in the field. Managers can design their own retail audits, consisting of customizable questions about a list of products. Reps save valuable time by filling out these highly efficient audits instead of countless individual forms. The data collected in retail audits is highly organized, and can be viewed in Repsly or easily exported for further analysis.

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



**BrandGood**  
745 Atlantic Avenue  
Boston, MA  
01222

**BrandGood**  
745 Atlantic Avenue  
Boston, MA  
01222

**Retail audit raw view**    Period: 1/1/2016 - 7/7/2016

Num	Place	Date	Retail audit	Product ID	Product	Product group	Available	Price
1	Bills restaurant True, Jazzy Juice Independent,FreeFresh, Massachusetts 02110, United States	1/6/2016	Jazzy Juice Audit	11	Extreme Strawbana	Jazzy	True	3.99
2	Bills restaurant True, Jazzy Juice Independent,FreeFresh, Massachusetts 02110, United States	1/6/2016	Jazzy Juice Audit	9	Lemonberry Dazzle	Jazzy	True	1.99
3	Market Basket 700 Boston Road, Sutton, Ma 1590, US	1/8/2016	Jazzy Juice Audit	11	Extreme Strawbana	Jazzy	True	3.99
4	CVS 16 BOSTON ROAD, Sutton, MA matthew.creamer@repsly.com, 508-865-7937, MA 1824, US	1/8/2016	Jazzy Juice Audit	11	Extreme Strawbana	Jazzy	True	4.99
5	CVS 16 BOSTON ROAD, Sutton, MA matthew.creamer@repsly.com, 508-865-7937, MA 1824, US	1/8/2016	Jazzy Juice Audit	9	Lemonberry Dazzle	Jazzy	True	2.99
6	Market Basket 700 Boston Road, Sutton, Ma 1590, US	1/15/2016	Jazzy Juice Audit	11	Extreme Strawbana	Jazzy	True	3.99
7	Market Basket 700 Boston Road, Sutton, Ma 1590, US	1/15/2016	Jazzy Juice Audit	12	Kiwi Lime Time	Jazzy	True	1.99
8	CVS 16 BOSTON ROAD, Sutton, MA	1/15/2016	Jazzy Juice Audit	11	Extreme Strawbana	Jazzy	True	4.99

**Retail audit pivot - "Jazzy Juice Audit"**    Field: Product price    Period: 1/1/2016 - 7/7/2016

Place ID	Place	Address	City	Status	Extreme Strawbana	Grape-Splision	Kiwi Lime Tim
2277130	Calliope's	True	Boston, Massachusetts 2116, United States	Active	3.9900		1.9
327150004	Market Basket	700 Boston Road	Sutton, Ma 1590, US	Prospect	0.0000		0.0
327150140	CVS 16 BOSTON ROAD, Sutton, MA	matthew.creamer@repsly.com	508-865-7937, MA 1824, US	Active	0.0000		
327150154	CVS	1280 WORCESTER RD.	Boston, MA 1702, US	Active	3.9900	0.0000	4.0
327150448	Whole Foods	331 Paradise Road	Boston, Ma 1907, US	Active	2.9900		
2397366	Alewife Grocers	11 CambridgeSide PI	Cambridge, Massachusetts 02141, United States	Active	1.9900	2.9900	
2549881	Boston snacks	True	MattsSnax Jazzy Juice Independent,FreeFresh 02111, United States	Active	2.9900		3.9
2904809	Bills restaurant	True	Jazzy Juice Independent,FreeFresh, Massachusetts 02110, United States	Active	399.0000		5.9

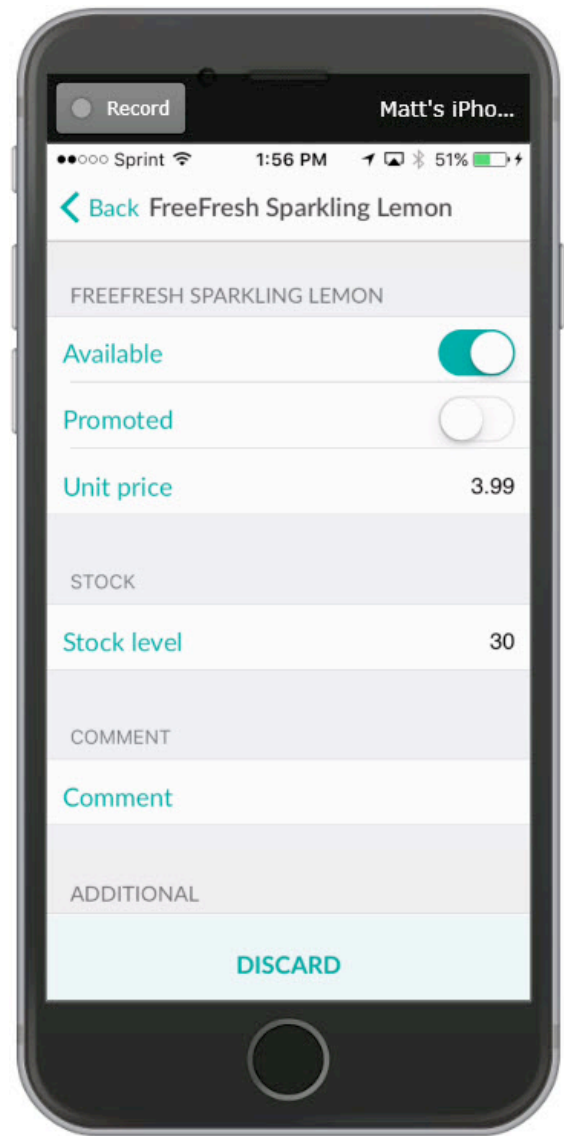
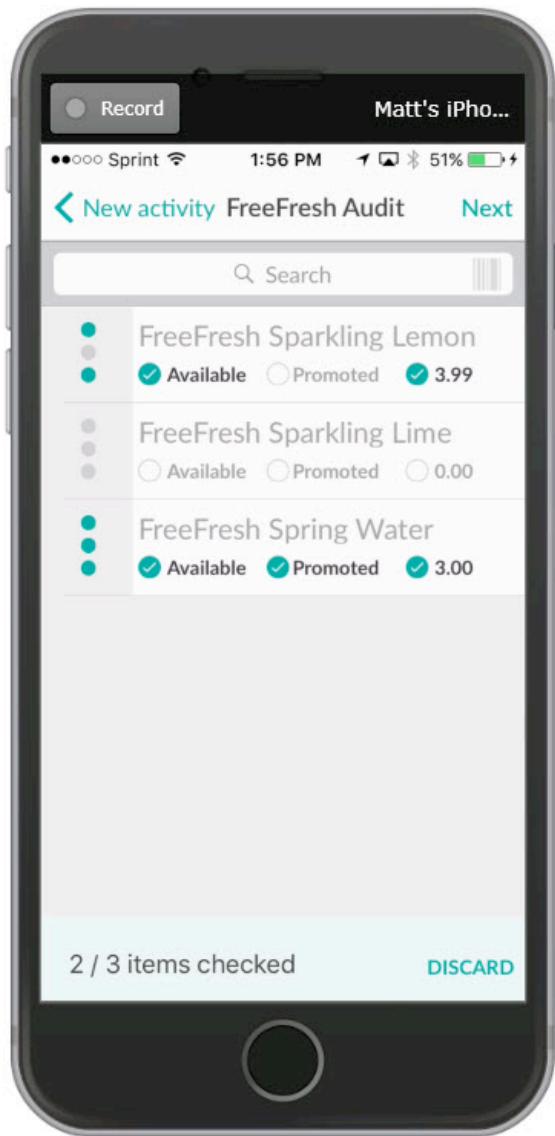
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Place ID	Place	Street Ad	Zip Code	City	State	Country	Tags	Territory	Status	Represen	Represen	Documen	Entry date
2549881	Boston sn True	02111	MattsSnax	United St	MattsSnax	West	Active	creamer	Matthew	100774	03/6/2016	16/3/2016	16
4181240	Cambridg 745 Atlan	02111	Boston	Massachu	United St		Active	Deirdre	St 1007720	06/3/2016	16/3/2016	14	
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## Mobile View of Retail Audits

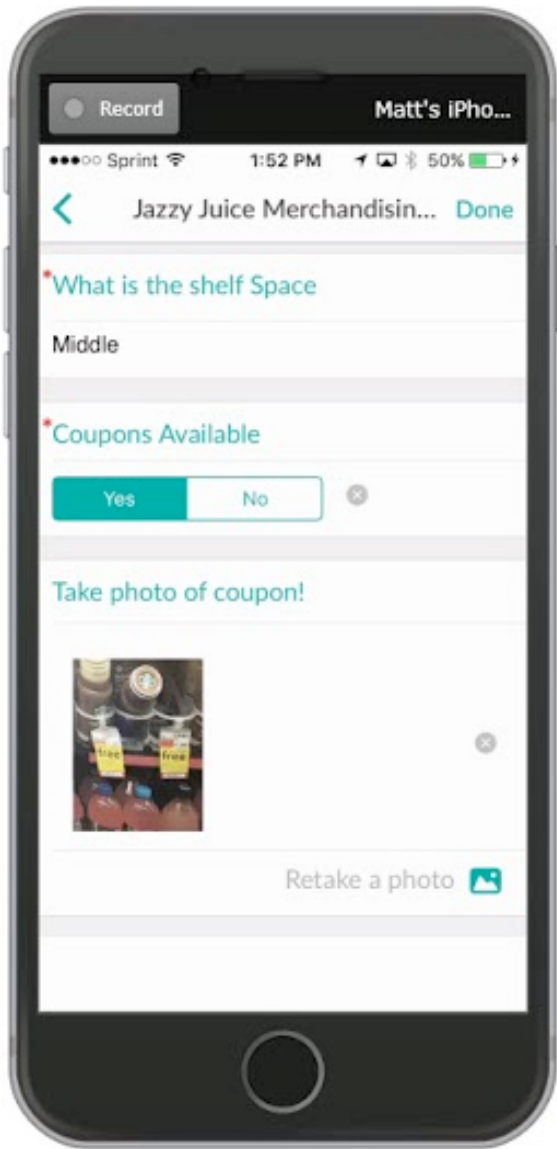


## 2) Customizable Electronic Forms – with signature capture

For more general information, back-office managers can create customizable forms. These forms are completely flexible: they can consist of an endless number of yes/no questions, dropdowns, free text, photos, barcodes, or electronic signatures. In just minutes, a manager can design, create, and send out a new form. Forms can be assigned to specific clients or reps, to ensure that each rep collects the correct data at each client. Completed forms can immediately be viewed in Repsly or easily exported in PDF or XLS formats.

Create and edit forms

The screenshot displays the 'Set form accessibility' section of the Repsly form creation tool. It includes filters for 'Connected to places with any of these tags' (JazzyJuice, WholeFoods) and 'Visible to these reps' (All reps). The 'Questions & input fields' section shows three questions: 'How many facing do we have?' (text input), 'What is the shelf Space' (dropdown menu with options Top, Middle, Bottom), and 'Coupons Available' (checkbox). A sidebar on the right contains 'Setting Filters' and 'Prepare custom forms' tips.



Deploy for reps to gather

See and share the results

Date:	7/6/2016
Representative:	Matthew Creamer
Place:	La Colombe Coffee Roasters
Address:	745 Atlantic Avenue Boston, Massachusetts 02111, United States
Show on map	
Product Name	Cheese Popcorn
Product Code	9780684849133
Quantity Needed	10
Photo of Shelf	
Signature	





# 3) Capture Photo Data

## Within Electronic Forms

Photos can be included as fields in the electronic forms designed by managers. They can be used to document up-to-date statuses of shelves, promotional displays, or competitor displays. Through these photos, back-office managers can see exactly what their reps are seeing in real time. The photos can be viewed alongside their forms on the web console and mobile app, and can be shared via link.

[Go to the sample form sharing link](#)

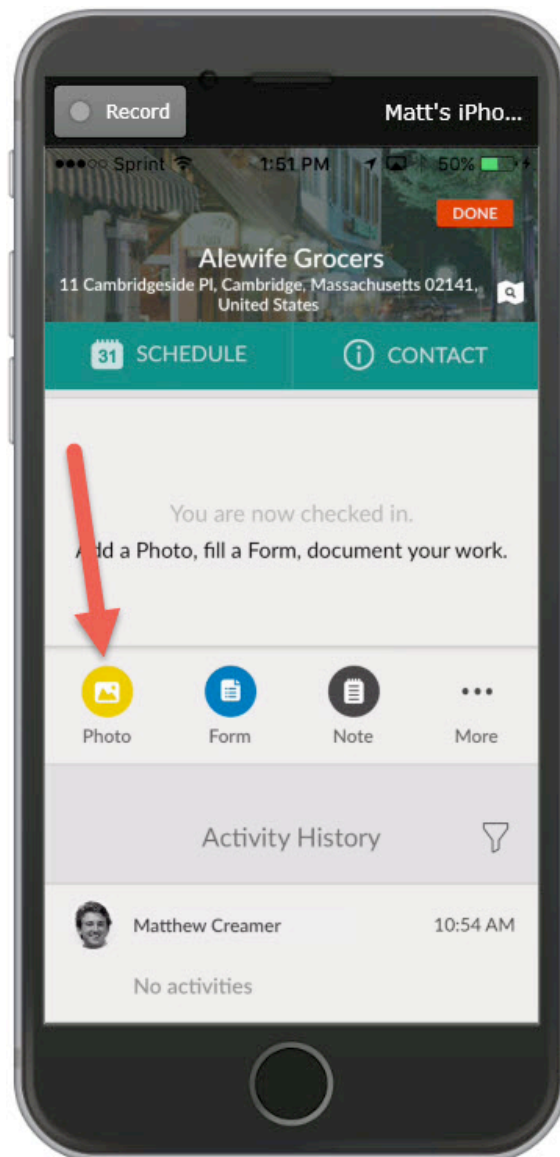
Place	Product Name	Product Code	Quantity Needed (cases)	Photo of Shelf
AM HUB385	xtreme Strawbana	1234567890	12	
PM Bell's Market	rape-Spllosion	9780684849133	20	
M nicks country market	xtreme Strawbana	9780684849133	30	
PM Boston snacks	rape-Spllosion	9780684849133	10	
AM Jasper Deli	monberry Dazzle	9780684849133	15	



## At the Visit Level

Reps can also take photos that aren't associated with any forms, and instead are tied to a visit as a whole. These photos can be tagged for easy searching and sorting, viewed in a gallery, and shared via link.

[Go to a sample photo gallery sharing link](#)



## 4) Orders – With Electronic Signatures

With Repsly, back-office managers can create or import lists of products that reps can use to capture orders in the field. These lists can organize products into customizable groups for ease of use, and each product will be listed with a price. Reps can select products from a list for an order, and the total value of the order will automatically be calculated based on the listed prices. If desired, reps can be configured to apply discounts.

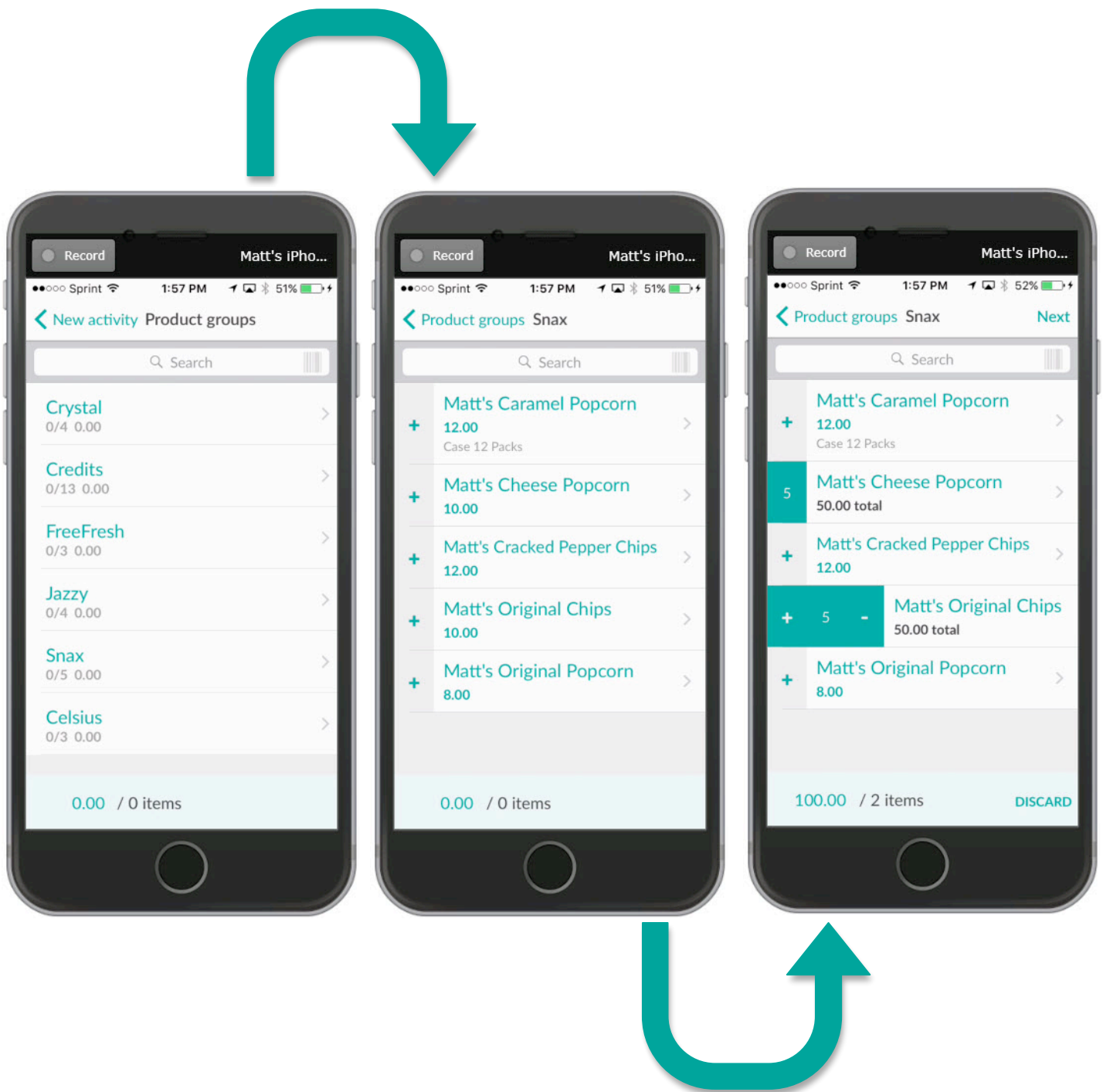
The screenshot displays the Repsly 'Products' management interface. The top navigation bar includes 'Activities', 'Representatives', 'Places', 'Forms', 'Schedule', and 'Reports'. The main header shows 'Products' with a subtitle 'Define products that you use in your organization' and a '+ NEW PRODUCT' button. Below this is a search bar and filter options. The main content area is a table of products with columns for 'Product ID', 'Product', 'Price', and 'Active'. A modal window titled 'Add groups, change sort or deactivate them' is overlaid on the bottom right, showing a list of product groups with their IDs and active status.

Product ID	Product	Price	Active
33	Bike 123 Credits	0.00	✓
31	Celsius Orange 4 Pack Celsius	0.00	✓
30	Celsius Orange Single Celsius	2.99	✓
32	Celsius Orange 12 Pack Celsius	35.99	✓
27	Crystal Kombucha Lemon Ginger Crystal	21.00	✓
26	Crystal Kombucha Peach Crystal		
28	Crystal Kombucha Tart Tangerine Crystal		
29	Crystal Kombucha Tropical Blend Crystal		

ID	Product group	Is active
CRY	Crystal	✓
CRED	Credits	✓
FF	FreeFresh	✓
JJ	Jazzy	✓
MS	Snax	✓
CS	Celsius	✓



## Mobile View of Orders





## Analyze and Plan

Repsly Reporting organizes all reports in intuitive formats, and makes it easy to customize a reporting dashboard with the most important information

# 1) Reporting Within Repsly

Repsly's Retail Audits and Forms provide easy channels for collecting data in stores, and reporting makes that data easy to analyze and understand. On the Reporting Dashboard, Repsly automatically turns forms into charts and graphs to give you insights about the data your reps collect in the field. Data can be viewed based on any combination of powerful filters, including dates, reps, customers, territories and tags.

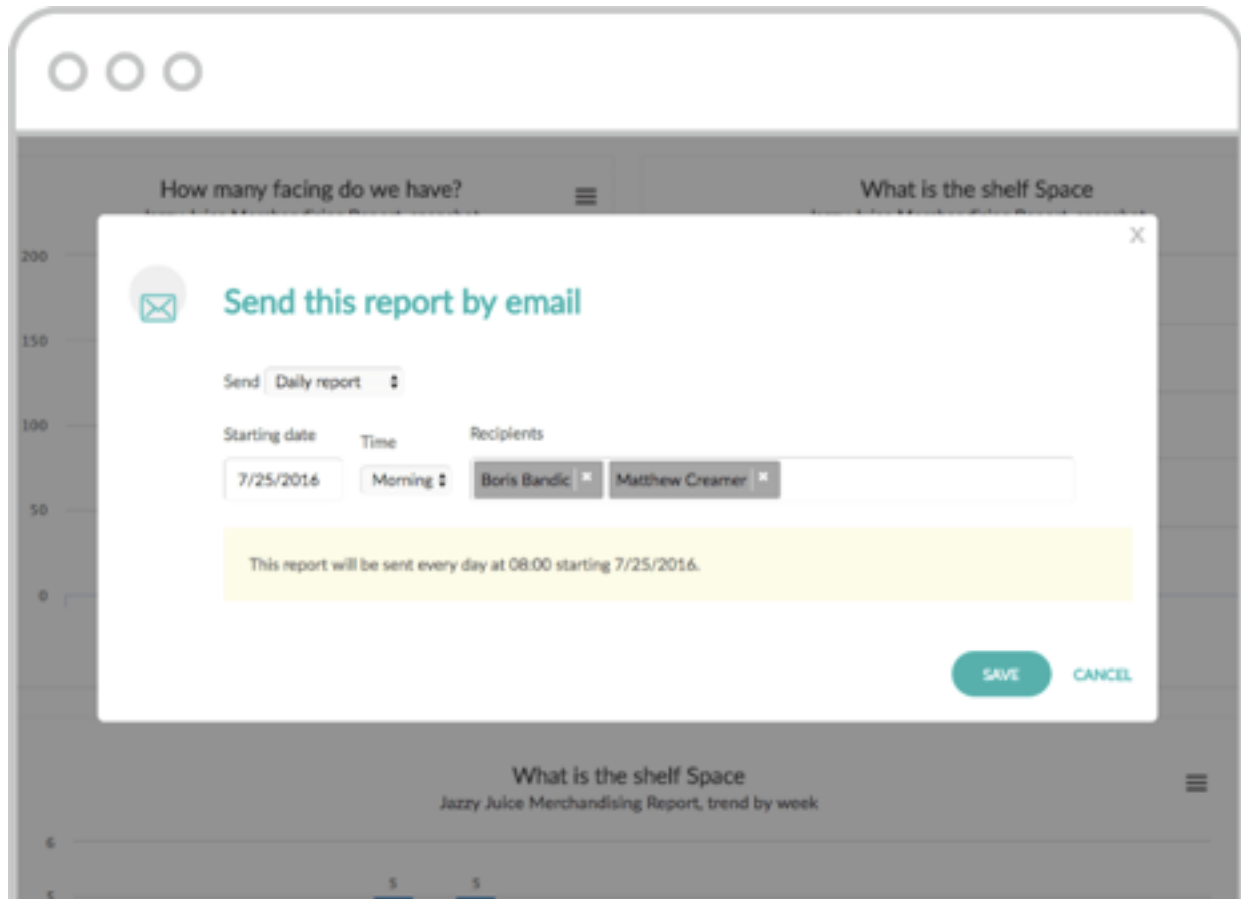
## Organized Data on Reporting Dashboard



Pre-built reports organize field activity data to provide the visibility needed to drive efficiency throughout a field team.



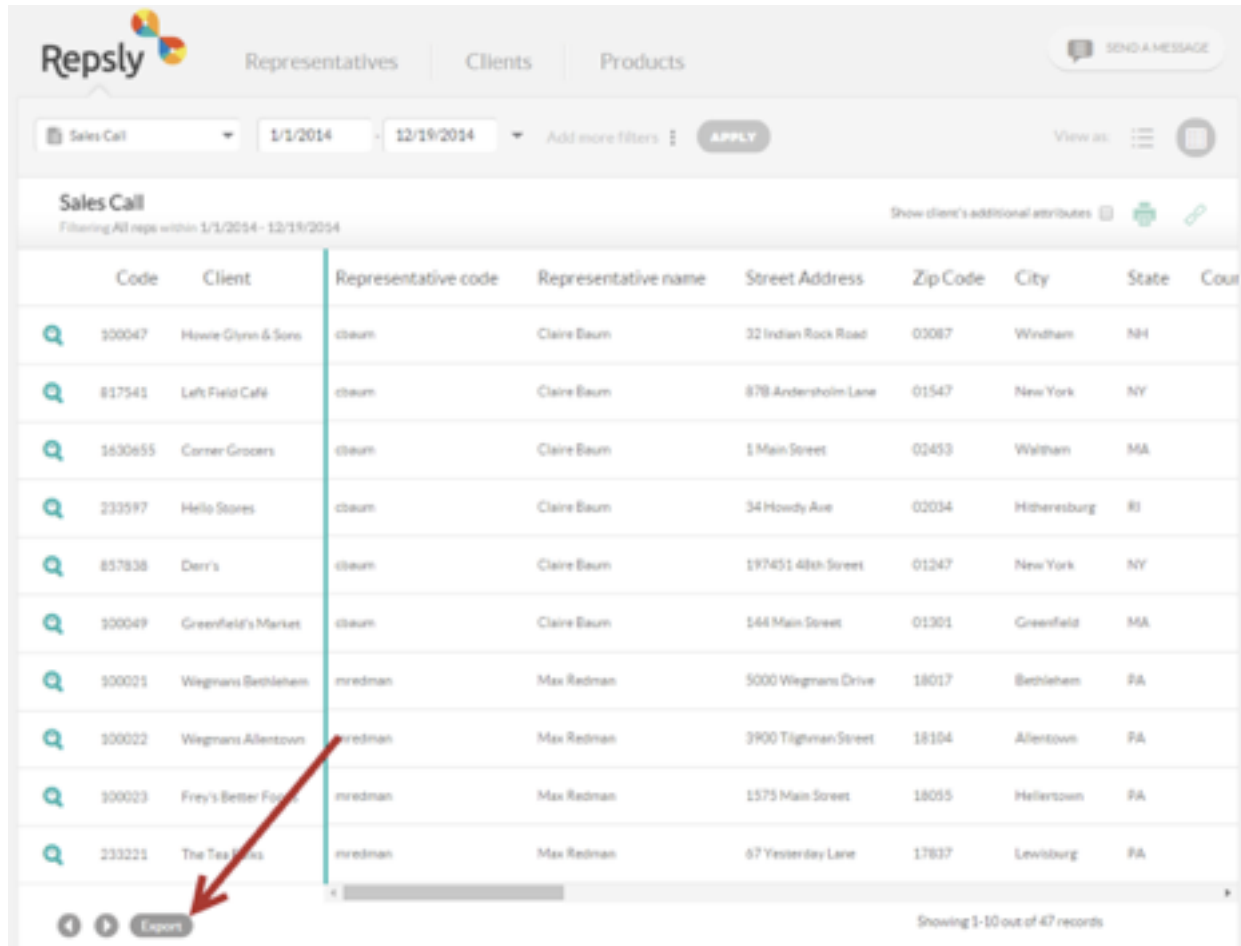
Dashboards can be scheduled to be sent to anyone by email, so managers, reps, or retailers can receive daily, weekly, or monthly updates.





## Powerful Exports

If Repsly's powerful reporting isn't enough, data can easily be exported via pdf, excel, or csv.

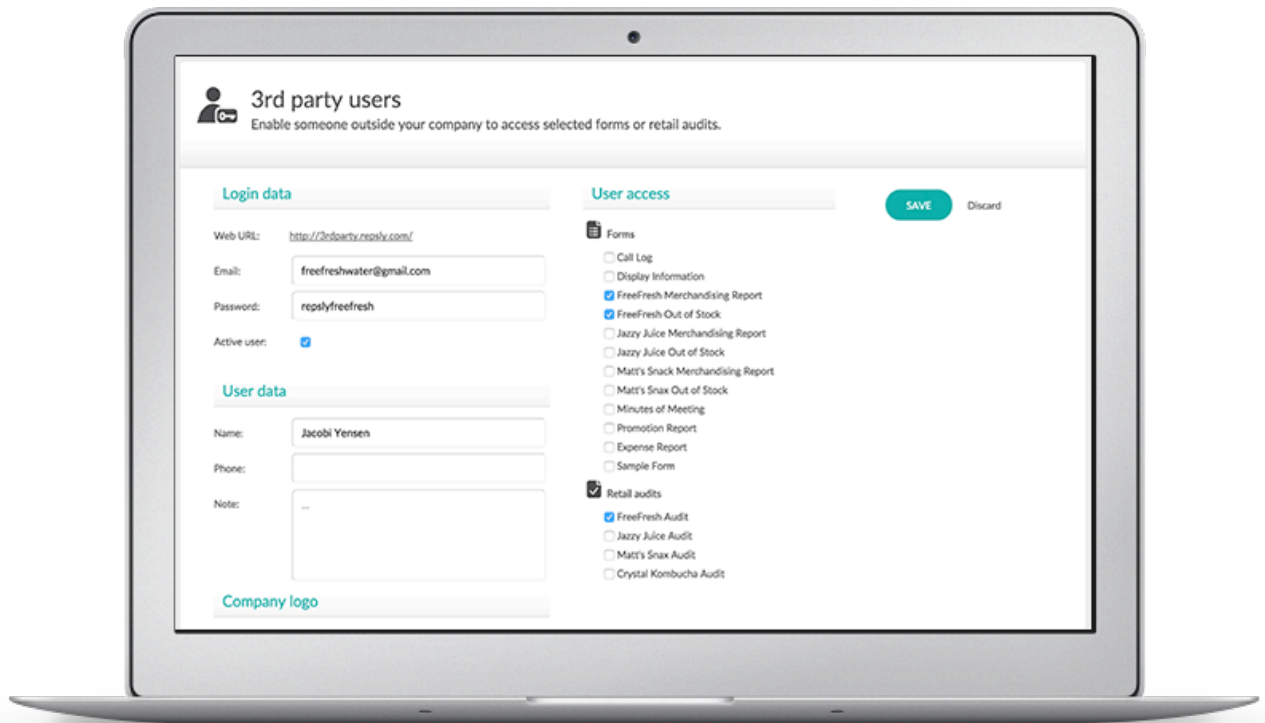


The screenshot displays the Repsly interface for a 'Sales Call' report. The report is filtered for the period 1/1/2014 to 12/19/2014. The table contains 10 records, each with a search icon in the first column. The 'Export' button is located at the bottom left of the table area, and a red arrow points to it. The status bar at the bottom right indicates 'Showing 1-10 out of 47 records'.

Code	Client	Representative code	Representative name	Street Address	Zip Code	City	State	Country
300047	Howe Glynn & Sons	cbaum	Claire Baum	32 Indian Rock Road	03087	Windham	NH	
817541	Leh Field Cafe	cbaum	Claire Baum	878 Ardenholm Lane	01547	New York	NY	
1630655	Corner Grocers	cbaum	Claire Baum	1 Main Street	02453	Walham	MA	
233597	Hello Stores	cbaum	Claire Baum	34 Howdy Ave	02034	Hitherburg	RI	
857838	Derr's	cbaum	Claire Baum	197451 48th Street	01247	New York	NY	
300049	Greenfield's Market	cbaum	Claire Baum	144 Main Street	01301	Greenfield	MA	
300021	Wegmans Bethlehem	mredman	Max Redman	5000 Wegmans Drive	18017	Bethlehem	PA	
300022	Wegmans Allentown	mredman	Max Redman	3900 Tighman Street	18104	Allentown	PA	
300023	Frey's Better Foods	mredman	Max Redman	1575 Main Street	18055	Hellertown	PA	
233221	The Tea Shop	mredman	Max Redman	67 Yesterday Lane	17837	Lewisburg	PA	

## Third Party Access

Repsly gives managers the power to grant third parties independent access to specific forms. Rather than packaging information and sending it to individual clients, clients can have unique self-service portals to check on data at any point in time.





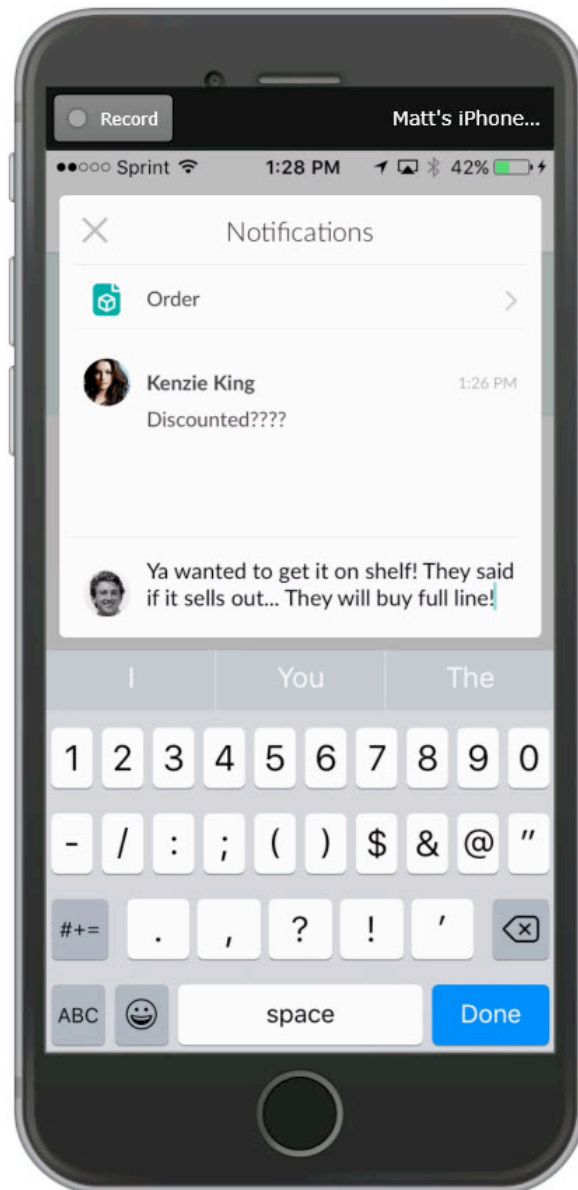
## Improve Efficiency

Repsly is equipped with powerful tools that facilitate overall improvement of an organization's function. These tools improve communication within the organization, make store visits more efficient, and ensure that territory coverage is optimized.

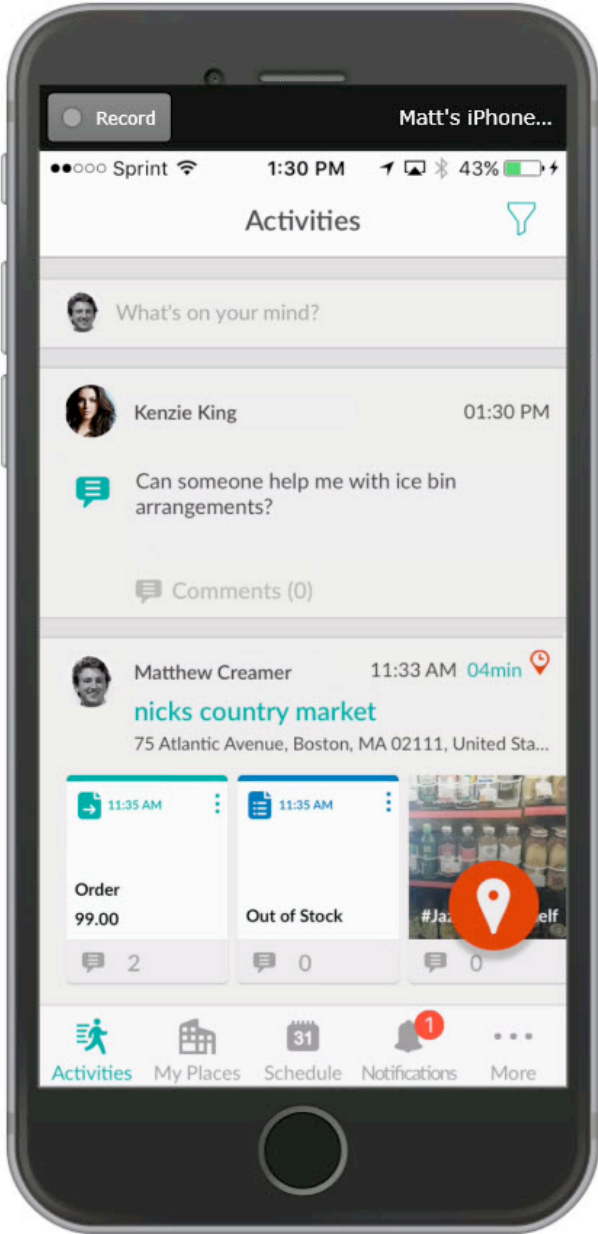
# 1) Team Collaboration

Repsly includes a team collaboration component that consists of messaging and stream sharing. Direct messaging facilitates communication between managers and field reps. The stream component is similar to social media streams, where managers and reps can interact and comment on activities and projects.

## Direct Messaging



# Activity Feed



## 2) 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 that all clients are being checked up on regularly. Notes can also be added to each scheduled visit, to remind reps of specific tasks to complete or questions to ask. From the back office, managers can see whether or not their reps are completing their scheduled visits, and can view the details of visits completed in the past. Reps can see all of this information from their mobile apps as well.

The image displays the Repsly interface for scheduling visits. The main view is a calendar for Matthew Creamer in May 2016, showing various visits scheduled throughout the month. A 'Schedule new visit' form is overlaid on the bottom left, and a mobile app view of the calendar is shown on the right.

**Matthew Creamer - Schedule**

Representative info | Report | **Schedule**

May 2016

SUN	MON	TUE	WED	THU	FRI	SAT
1 8:00 AM Hyatt Regency Coconut Pt	2 Any time Shaw's/ Star Market	3 Any time Callope's	4 Any time CVS	5 Any time Whole Foods	6 Any time CVS	7
	8:08 AM Hyatt Regency Coconut Pt	Any time CVS	Any time CVS	9:34 AM Jasper Deli	10:36 AM CVS	
	9:30 AM CVS 16 BOSTON ROAD	11:20 AM Boston snacks	8:39 AM Johns Grocers	11:42 AM Walmart	11:23 AM Market Basket	
	1:06 PM Hyatt Regency Coconut Pt	4:48 PM Mobil	9:38 AM Walmart		1:24 PM CVS 16 BOSTON ROAD	
8	9	10	11	12	13	14
	Any time Shaw's/ Star Market	7:41 AM Graybill Snack Outlets	10:26 AM Callope's	Any time Callope's	Any time CVS 16 BOSTON ROAD	
	10:55 AM Jasper Deli	9:32 AM Boston commons	11:15 AM Market Basket	Any time CVS	1:28 PM Repsly Boston Office	
	10:55 AM Jasper Deli	10:58 AM Bills restaurant	11:20 AM Whole Foods	Any time Shaw's/ Star Market	1:28 PM Walmart	
	11:21 AM Callope's	11:03 AM Callope's	11:20 AM Whole Foods	9:42 AM Boston commons	4:15 PM Market Basket	
	2:43 PM Callope's	+3 more	+7 more	+5 more	7:00 PM CVS	
15	16	17	18	19		
Any time Callope's	Any time Shaw's/ Star Market	Any time Callope's	Any time CVS	2:41 PM Bills restaurant	Any time CVS	
					Any time CVS 16 BOSTON ROAD	
					12:27 PM Alewife Grocers	
					4:15 PM Market Basket	

**Schedule new visit for 07/12/2016**

Date: 07/12/2016 | Time (optional): Any time | Representative: Matthew Creamer

Place: 4725768 - Stoddard's Fine Food & Ale, 48 Temple Pl, Boston, MA 02111, USA

Visit note (optional):

Repeats:  Don't repeat  Repeat every  week(s)

ADD TO SCHEDULE | CANCEL

**Mobile App View:**

Record | Matt's iPhone... | 2:22 PM | 50% battery

Schedule

July, 2016

s	m	t	w	t	f	s
26	27	28	29	30	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	29	30
31	01	02	03	04	05	06

VISITED AS SCHEDULED

ANYTIME Scheduled visit  
One-time

VISITS

Matthew Creamer



### 3) Maps

Repsly gives managers the power to use maps and activity tracking as part of their field team management. On the manager's console, back office staff can see where work is getting done and how well territories are being covered. The maps provide pins for all field activities, which can be filtered by rep, client, territory, or activity.

Repsly simplifies the work of field reps by integrating seamlessly with Google Maps to provide directions to clients. Reps can also see a map view of all their clients, and efficiently plan routes. The Search Nearby feature provides representatives with location based recommendations for new business opportunities.

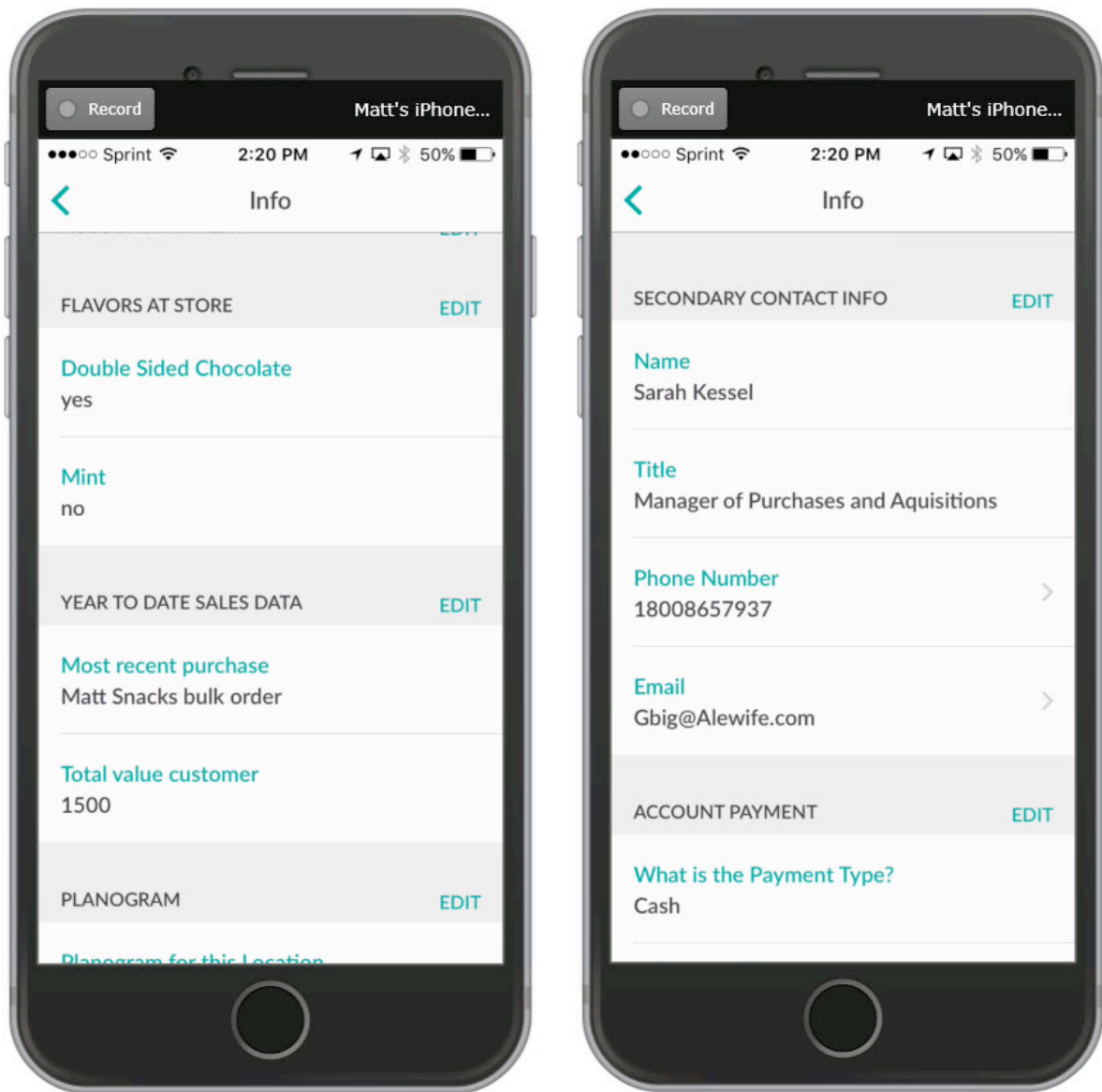
[image - manager's console]

[image - mobile view]



## 4) Completely Customizable Customer Info

Repsly allows back office managers to create customer information fields to share with field reps. Managers can decide exactly what information is important to keep on each customer, and customize a page to fit this. Reps have all pertinent information about each of their customers at their fingertips at all times, including contact details, store demographics, business details, and anything else they need to know in order to effectively complete their work. Reps can optionally be enabled to edit this information while in the field.







# 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. Tag Messages for searching later
- Interactive Rep Activity Feed. Comment on photos, check-ins, and form completions.
- Automated activity reports emailed to managers
- Client Portal – Give third parties secure access to specific data sets

