

Welcome to Repsly U!



# WELCOME TO REPSLY U!

## The Power of Sales Documents

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What is a Sales Document?

## What is a Sales Document?

Sales Documents help businesses understand their retail performance.

Sales Documents can help businesses make data-backed and well-informed decisions on:

- Ordering Stock
- Promotions
- Staffing
- Other Plans

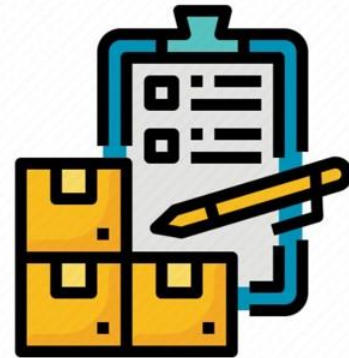


## Why work with Sales Documents?

### Why work with Sales Documents?

To stay on top of the following:

- Inventory on Hand
  - On shelf
  - Backstock
- Low Stock
- Product Performance
- Sales Summary
- Sales Report
  - By Product
  - By Product Type



### Why work with Sales Documents?

- Sales Report
  - By Customer
  - By Customer Group
- Sell-Through Report



## Sales Documents Best Practices

### Sales Documents Best Practices

- Keep data in one place
- Have flexible reporting
- Keep information in real-time



**Please note:**  
Sales Documents in Repsly are available to Pro+, Premium, and Enterprise customers. If you are an Essentials customer interested in the abilities described today, contact your Repsly CSM.



## Examples:

### Order Form

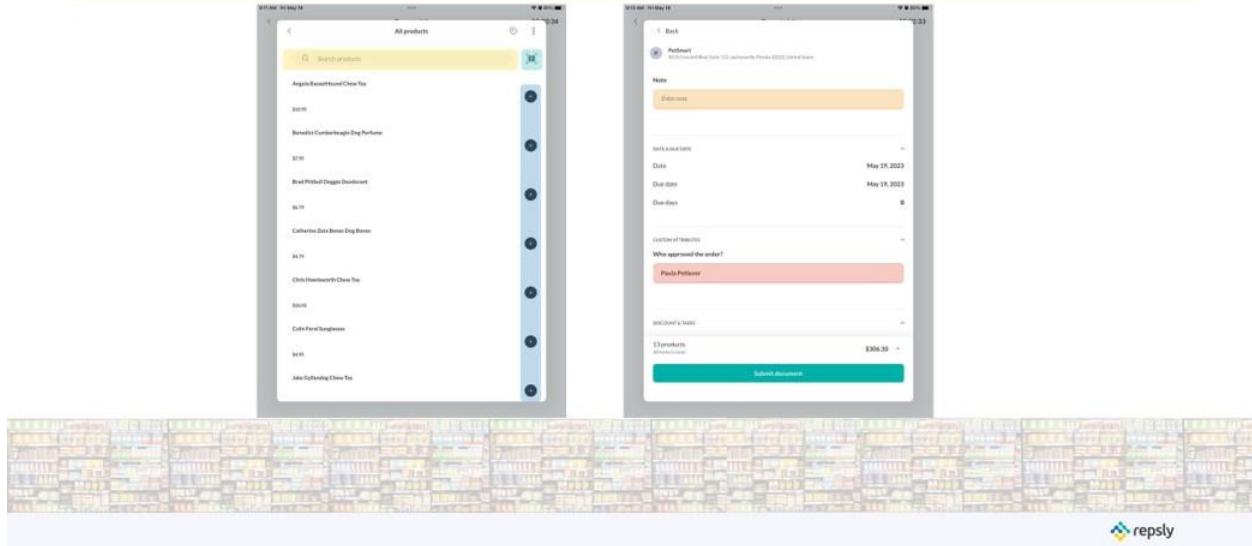
#### Example 1: Order Form

The **Order Form** allows reps to place orders while in the store. It offers the following benefits:

- Helps prevent out-of-stocks
- Allows for reporting on a store's product movement
- Allows for reporting on reps' sales
- Provides all of this in real-time



## Order Form: View from the Mobile App



## Order Form: Reporting Example

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC	AD	AE		
1	Place	Street	Zip	Co	City	State	County	Place	Territ	Status	Repre	Repre	Docun	Entry	Docun	Due	Line	ID	Produ	Produ	Produ	Quant	Price	Line	It	Line	It	Price	Order	Total	Tax	an
2	PetSm	9515	C	52222	Jackson	Florida	Unitec	OakLe			56620	Lyssa	17872	5/19/25	19/25	19/25		ABCT	Angeli	SDPS	Snorki	5	10.95	54.75	0	0	54.75	0	0	54.75	0	
3	PetSm	9515	C	52222	Jackson	Florida	Unitec	OakLe			56620	Lyssa	17872	5/19/25	19/25	19/25		BCDP	Bened	SDPS	Snorki	5	7.95	39.75	0	0	39.75	0	0	39.75	0	
4	PetSm	9515	C	52222	Jackson	Florida	Unitec	OakLe			56620	Lyssa	17872	5/19/25	19/25	19/25		BPDP	Brad P	SDPS	Snorki	5	6.79	33.95	0	0	33.95	0	0	33.95	0	
5	PetSm	9515	C	52222	Jackson	Florida	Unitec	OakLe			56620	Lyssa	17872	5/19/25	19/25	19/25		CZBBo	Cather	SDPS	Snorki	2	4.79	9.58	0	0	9.58	0	0	9.58	0	
6	PetSm	9515	C	52222	Jackson	Florida	Unitec	OakLe			56620	Lyssa	17872	5/19/25	19/25	19/25		CFDS	Colin	SDPS	Snorki	4	4.95	19.80	0	0	19.80	0	0	19.80	0	
7	PetSm	9515	C	52222	Jackson	Florida	Unitec	OakLe			56620	Lyssa	17872	5/19/25	19/25	19/25		JGCT	Jake G	SDPS	Snorki	5	10.95	54.75	0	0	54.75	0	0	54.75	0	
8	PetSm	9515	C	52222	Jackson	Florida	Unitec	OakLe			56620	Lyssa	17872	5/19/25	19/25	19/25		MRC	Mark	SDPS	Snorki	4	10.95	43.80	0	0	43.80	0	0	43.80	0	
9	PetSm	9515	C	52222	Jackson	Florida	Unitec	OakLe			56620	Lyssa	17872	5/19/25	19/25	19/25		MWDE	Mark	SDPS	Snorki	3	4.79	14.37	0	0	14.37	0	0	14.37	0	
10	PetSm	9515	C	52222	Jackson	Florida	Unitec	OakLe			56620	Lyssa	17872	5/19/25	19/25	19/25		MTDB	Millie	SDPS	Snorki	1	4.79	4.79	0	0	4.79	0	0	4.79	0	
11	PetSm	9515	C	52222	Jackson	Florida	Unitec	OakLe			56620	Lyssa	17872	5/19/25	19/25	19/25		BPCT	Millie	SDPS	Snorki	1	4.79	4.79	0	0	4.79	0	0	4.79	0	
12	PetSm	9515	C	52222	Jackson	Florida	Unitec	OakLe			56620	Lyssa	17872	5/19/25	19/25	19/25		NNBC	Nibble	SDPS	Snorki	1	7.99	7.99	0	0	7.99	0	0	7.99	0	
13	PetSm	9515	C	52222	Jackson	Florida	Unitec	OakLe			56620	Lyssa	17872	5/19/25	19/25	19/25		NNBC	Nibble	SDPS	Snorki	1	7.99	7.99	0	0	7.99	0	0	7.99	0	
14	PetSm	9515	C	52222	Jackson	Florida	Unitec	OakLe			56620	Lyssa	17872	5/19/25	19/25	19/25		SIBST	Sarah	SDPS	Snorki	1	9.99	9.99	0	0	9.99	0	0	9.99	0	
15	PetSm	9515	C	52222	Jackson	Florida	Unitec	OakLe			56620	Lyssa	17872	5/19/25	19/25	19/25		AACT	Ana D	SDPS	Snorki	1	10.95	10.95	0	0	10.95	0	0	10.95	0	
16	PetSm	9515	C	52222	Jackson	Florida	Unitec	OakLe			56620	Lyssa	17872	5/18/25	18/25	18/25		ABCT	Angeli	SDPS	Snorki	1	10.95	10.95	0	0	10.95	0	0	10.95	0	
17	PetSm	9515	C	52222	Jackson	Florida	Unitec	OakLe			56620	Lyssa	17872	5/18/25	18/25	18/25		BCDP	Bened	SDPS	Snorki	1	7.95	7.95	0	0	7.95	0	0	7.95	0	
18	PetSm	9515	C	52222	Jackson	Florida	Unitec	OakLe			56620	Lyssa	17872	5/18/25	18/25	18/25		BPDP	Brad P	SDPS	Snorki	1	6.79	6.79	0	0	6.79	0	0	6.79	0	
19	PetSm	9515	C	52222	Jackson	Florida	Unitec	OakLe			56620	Lyssa	17872	5/18/25	18/25	18/25		CZBBo	Cather	SDPS	Snorki	1	4.79	4.79	0	0	4.79	0	0	4.79	0	
20	26147	Bisky	8570	B	52244	Jackson	Florida	Unitec	Furnit	Water	56620	Lyssa	17872	5/12/25	12/25	12/25		CZBBo	Cather	SDPS	Snorki	20	4.79	95.80	0	0	95.80	0	0	95.80	0	
21	26147	Bisky	8570	B	52244	Jackson	Florida	Unitec	Furnit	Water	56620	Lyssa	17872	5/12/25	12/25	12/25		CFDS	Colin	SDPS	Snorki	5	4.95	24.75	0	0	24.75	0	0	24.75	0	
22	26147	Bisky	8570	B	52244	Jackson	Florida	Unitec	Furnit	Water	56620	Lyssa	17872	5/12/25	12/25	12/25		MWDE	Mark	SDPS	Snorki	20	4.79	95.80	0	0	95.80	0	0	95.80	0	
23	26147	Bisky	8570	B	52244	Jackson	Florida	Unitec	Furnit	Water	56620	Lyssa	17872	5/12/25	12/25	12/25		MTDB	Millie	SDPS	Snorki	20	4.79	95.80	0	0	95.80	0	0	95.80	0	

**Top 5 Products**

Product	# Sold
Mark Wahlbone Dog Bones	27
Catherine Zeta Bones Dog Bones	26
Millie Bobby Bone Dog Bones	25
Miles Terrier Dog Bones	21
Brad Pitbull Doggie Deodorant	13
Mark Ruffalo Squeaky Toy	12
Colin Feral Sunglasses	10
Angela BassetHound Chew Toy	10
Benedict Cumberbeagle Dog Perfume	9
Jake Gylendog Chew Toy	7
Ana De Alligator Chew Toy	7
Sarah Jessica Barker Squeaky Toy	6
Nibbles n Bits - Crunchy	5
Nibbles n Bits - Chewy	4
Chris Howlsworth Chew Toy	208
<b>Grand Total</b>	<b>208</b>

# Returns

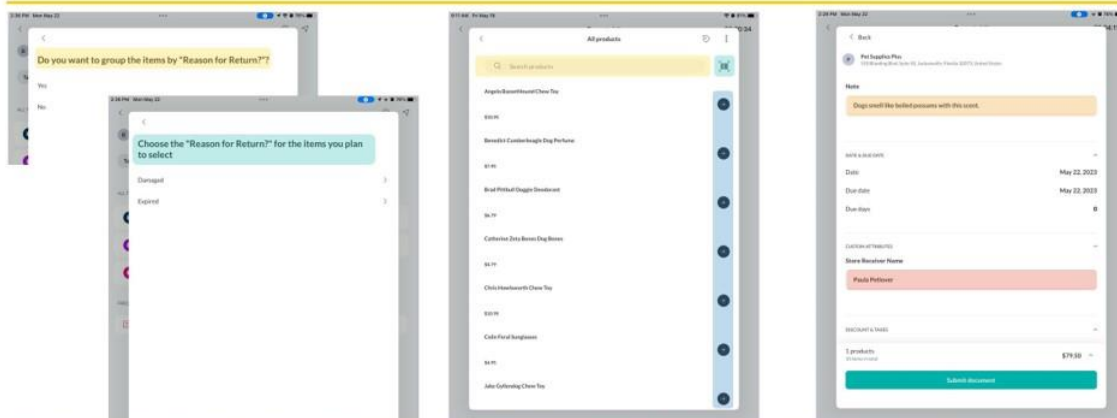
## Example 2: Returns

The **Returns Form** allows reps to process returns while in the store. It offers the following benefits:

- Helps keep on top of damaged and expired products
- Allows you to trend locations of repeat returns
- Allows you to trend products that are repeatedly returned
- Provides all of this in real-time



## Returns: View from the Mobile App



## Returns: Reporting Example

J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC	AD	AE	AF	AG	AH	AI	AJ	AK	AL	AM	AN																												
1	Status	Repr	Repr	Docun	Entry	Docun	Due	di	Line	N	ID	Produ	Produ	Produ	Quant	Price	Line	It	Line	It	Line	It	Price	a	Order	Total	C	Taxabl	Tax	an	Total	Note	Sales	c	Barroc	Sales	c	Sales	c	Reason	Deli	M	Deli	M														
2	76620	Lyssa	1178726	5/19/25	19/25	19/25	AACT	Ana	Dx	SDPS	Snorki	1	10.95	10.95	0	0	10.95	0	0	10.95	0	0	10.95	0	0	10.95	0	0	0	0	10.95	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0							
3	76620	Lyssa	1178726	5/19/25	19/25	19/25	ABCT	Angel	SDPS	Snorki	2	10.95	21.9	0	0	21.9	0	0	21.9	0	0	21.9	0	0	21.9	0	0	0	0	21.9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0				
4	76620	Lyssa	1178726	5/19/25	19/25	19/25	SIBST	Sarah	SDPS	Snorki	3	9.99	29.97	0	0	29.97	0	0	29.97	0	0	29.97	0	0	29.97	0	0	0	0	29.97	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
5	76620	Lyssa	1178726	5/19/25	19/25	19/25	BPOD	Brad	P	SDPS	Snorki	1	6.79	6.79	0	0	6.79	0	0	6.79	0	0	6.79	0	0	6.79	0	0	0	0	6.79	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0			
6	76620	Lyssa	1178726	5/19/25	19/25	19/25	CFDS	Colin	F	SDPS	Snorki	4	4.95	19.8	0	0	19.8	0	0	19.8	0	0	19.8	0	0	19.8	0	0	0	0	19.8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
7	76620	Lyssa	1178726	5/19/25	19/25	19/25	MTDB	Miles	SDPS	Snorki	1	4.79	4.79	0	0	4.79	0	0	4.79	0	0	4.79	0	0	4.79	0	0	0	0	4.79	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0			
8	76620	Lyssa	1178726	5/19/25	19/25	19/25	BPOD	Brad	P	SDPS	Snorki	-1	6.79	-6.79	0	0	-6.79	0	0	-6.79	0	0	-6.79	0	0	-6.79	0	0	0	0	-6.79	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0			
9	76620	Lyssa	1178726	5/19/25	19/25	19/25	CZBBo	Cather	SDPS	Snorki	1	4.79	4.79	0	0	4.79	0	0	4.79	0	0	4.79	0	0	4.79	0	0	0	0	4.79	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
10	76620	Lyssa	1178726	5/19/25	19/25	19/25	NNBC	Nibbik	SDPS	Snorki	2	7.99	15.98	0	0	15.98	0	0	15.98	0	0	15.98	0	0	15.98	0	0	0	0	15.98	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

Product	# Returned
Sarah Jessica Barker Squeaky Toy	5
Colin Feral Sunglasses	4
Angela Bassett Hound Chew Toy	2
Nibbles n Bits - Chewy	2
Ana De A Alligator Chew Toy	1
Catherine Zeta Bones Dog Bones	1
Miles Terrier Dog Bones	1
Brad Pitt Bul Doggie Deodorant	0
<b>Grand Total</b>	<b>16</b>



## Swag Inventory

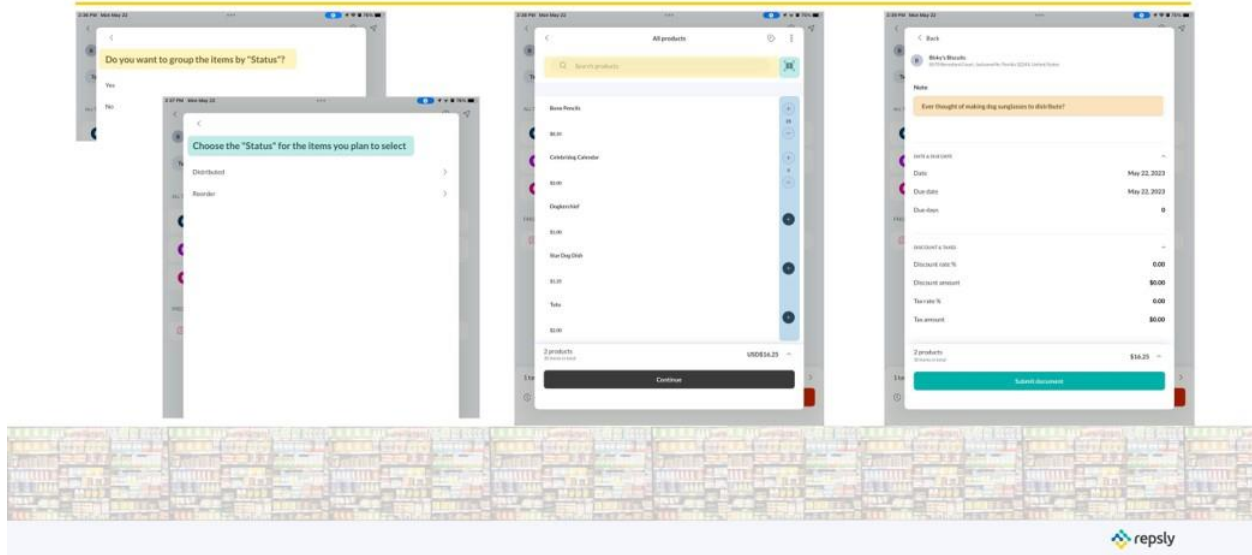
### Example 3: Swag Inventory

The **Swag Inventory** allows reps to keep an inventory of swag distributed while in the store. It can also allow for ordering swag. It offers the following benefits:

- Helps keep track of swag distributed
- Helps track the cost of distributing swag
- Keeps an inventory if needed for tax purposes
- Provides all of this in real-time



## Swag Inventory: View from the Mobile App



## Swag Inventory: Reporting Example

Place	Place	Street	Zip	Co	City	State	Count	Place	Item	Status	Reprint	Reprint	Docum	Entry	Docum	Due	d	Line	N	ID	Produ	Produ	Produ	Quant	Price	Line	R	Line	R	Price	Order	Total	Tax	am	T				
1	26147	Bisky's	8570	B	52244	Jackso	Florida	Unitec	Furnit	Water	76620	Lyssa	1	178726	5/19/25/19/25/19/25						Swag1	Bone	I	Dog	Sv	Dog	Sv	1	0.25	0.25	0	0	0.25	0	0	0.25	0		
2	26147	Bisky's	8570	B	52244	Jackso	Florida	Unitec	Furnit	Water	76620	Lyssa	1	178726	5/19/25/19/25/19/25						Swag3	Celebr	Dog	Sv	Dog	Sv	1	2	2	0	0	2	0	0	2	0	0	2	
3	26147	Bisky's	8570	B	52244	Jackso	Florida	Unitec	Furnit	Water	76620	Lyssa	1	178726	5/19/25/19/25/19/25						Swag4	Dogke	Dog	Sv	Dog	Sv	21	1	21	0	0	21	0	0	21	0	0	21	
4	26147	Bisky's	8570	B	52244	Jackso	Florida	Unitec	Furnit	Water	76620	Lyssa	1	178726	5/19/25/19/25/19/25						Swag2	Star	Dl	Dog	Sv	Dog	Sv	1	2	2	0	0	2	0	0	2	0	0	2
5	26147	Bisky's	8570	B	52244	Jackso	Florida	Unitec	Furnit	Water	76620	Lyssa	1	178726	5/19/25/19/25/19/25						Swag5	Tutu																	
6	26147	Bisky's	8570	B	52244	Jackso	Florida	Unitec	Furnit	Water	76620	Lyssa	1	178726	5/19/25/19/25/19/25						Swag3	BoneP																	
7	26147	Bisky's	8570	B	52244	Jackso	Florida	Unitec	Furnit	Water	76620	Lyssa	1	178726	5/19/25/19/25/19/25						Swag3	Celebr																	
8	26147	Bisky's	8570	B	52244	Jackso	Florida	Unitec	Furnit	Water	76620	Lyssa	1	178726	5/19/25/19/25/19/25						Swag4	Dogke																	
9	26147	Bisky's	8570	B	52244	Jackso	Florida	Unitec	Furnit	Water	76620	Lyssa	1	178726	5/19/25/19/25/19/25						Swag2	Star																	
10	26147	Bisky's	8570	B	52244	Jackso	Florida	Unitec	Furnit	Water	76620	Lyssa	1	178726	5/19/25/19/25/19/25						Swag5	Tutu																	
11	26147	Bisky's	8570	B	52244	Jackso	Florida	Unitec	Furnit	Water	76620	Lyssa	1	178726	5/19/25/19/25/19/25						Swag5	Tutu																	

Product	# of Products	Price	Total Cost
Distributed			
Bone Pencils	1	\$ 0.25	\$ 0.25
Celebridog Calendar	1	\$ 2.00	\$ 2.00
Dogkerchief	21	\$ 1.00	\$ 21.00
Star Dog Dish	1	\$ 1.25	\$ 1.25
Tutu	1	\$ 2.00	\$ 2.00
<b>Distributed Total</b>	<b>25</b>	<b>\$ 6.50</b>	<b>\$ 26.50</b>
Reorder			
Bone Pencils	20	\$ 0.25	\$ 5.00
Celebridog Calendar	15	\$ 2.00	\$ 30.00
Dogkerchief	15	\$ 1.00	\$ 15.00
Star Dog Dish	25	\$ 1.25	\$ 31.25
Tutu	6	\$ 2.00	\$ 12.00
<b>Reorder Total</b>	<b>81</b>	<b>\$ 4.50</b>	<b>\$ 97.50</b>

## How to Create a Sales Document in Repsly

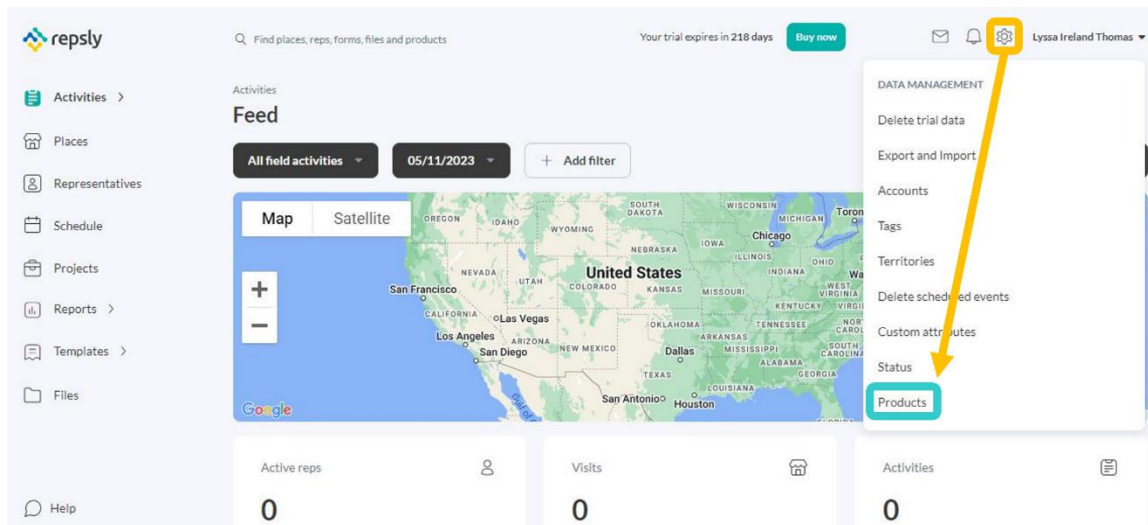
Before creating your Sales Document, you need to complete the following tasks in Repsly:

1. Add Products
2. Add Pricelist

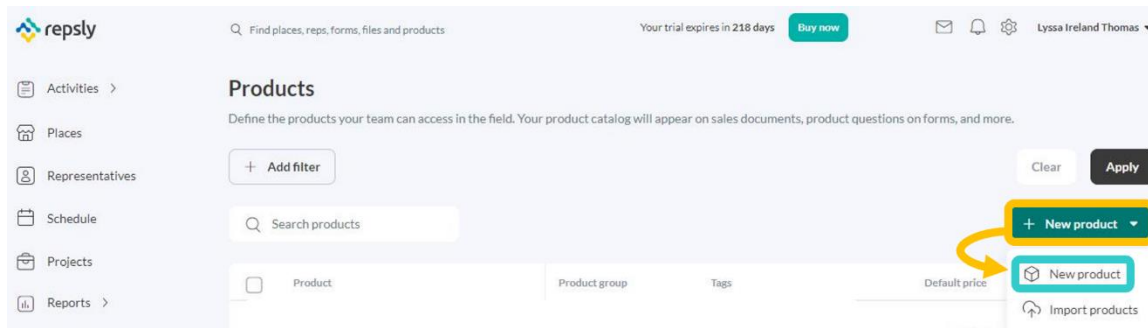
## Add Products to Repsly (2 Methods)

### Method 1: Add Products Individually

1. Click on the **Gear** icon > select **Products**.



2. Click **+ New Product**.



3. Enter the following information for the product:



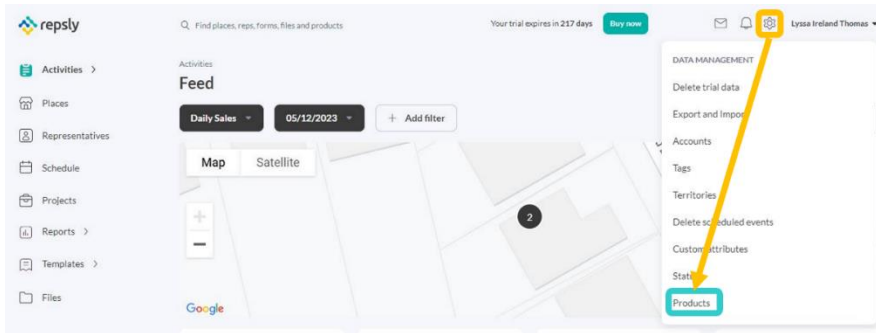
- a. Name
- b. ID
- c. Default Price
- d. **Product Group**: select from the drop-down list or click **Manage Product Groups** to create one.
- e. **Tags** (if applicable): select from the list or **Add Tag** in that window.

4. Make sure **Active** is checked > click **Save**.

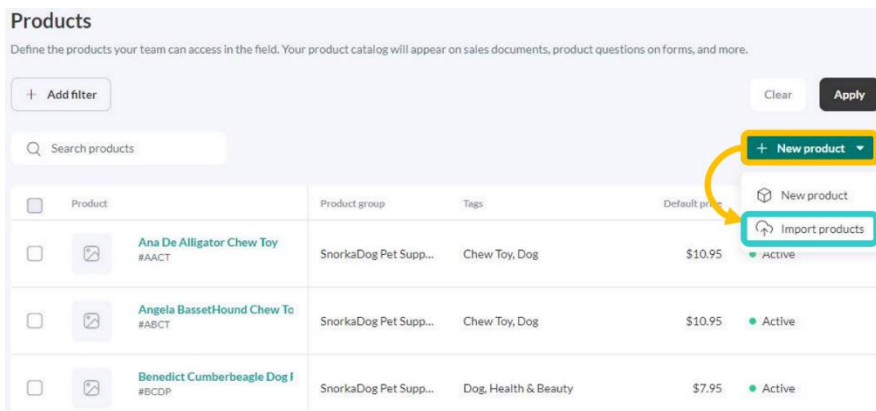
## Method 2: Importing Products

On the **Products** page, you can import products in bulk. This method is highly recommended if you need to enter more than a handful of products.

1. Click the **Gear** icon > select **Products**.



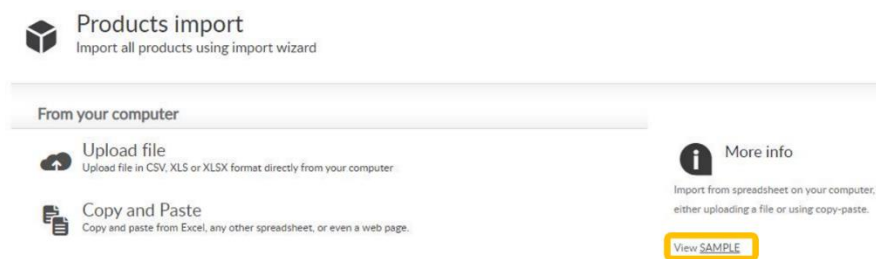
2. Click **+ New Product** > select **Import Products**.



## Download the Sample Template

You can create your own file to upload your products, but we have a sample file to simplify the task.

1. Click **View SAMPLE**.



2. Click **DOWNLOAD SAMPLE DATA HERE**.

**Sample CSV data** ×

To get your list of products that you can edit, use Export button at product list.

You can also download our sample file and use it as a template before you import your list of products.

[DOWNLOAD SAMPLE DATA HERE](#)

Or simply use Copy Paste with sample data below:

ID:Product;Product group ID:Product group;Unit price  
 3;Lennons Lager;1;Beer;3  
 4;McCartneys Ale;1;Beer;3

Possible fields: ID(\*), Product(\*), Product group ID, Product group, Barcode, Unit price, Note, Active, Image URL, Tag, Master product

[OK](#)

3. Click **OK** to close the window.
4. Save the template.

## Add Data to the Template

1. Once the sample template is open, you will see that **three rows have been completed**. These are data-entry examples.

	A	B	C	D	E	F	G	H
1	ID	Name	Product Group ID	Product Group	Barcode	Unit price	Note	Active
2	9588755	Crestorm IPA	1	Beer		3	Incredibly refreshing beer	true
3	9588756	Calfia Cold Brew	1	Beer		4	Slightly hazy with a gorgeous creamy white head	true
4	9588757	Flensburger Wasser	1	Beer		3.99	Balanced and enjoyable	true

2. Either hand enter or copy/paste your **product data** to match the formatting of the sample data.

	A	B	C	D	E	F	G	H	I	
1	ID	Name	Product Group ID	Product Group	Barcode	Unit price	Note	Active	Tag	Image URI
2	9588755	Crestorm IPA	1	Beer		3		true	beer, beverage	https://im
3	9588756	Calfia Cold Brew	1	Beer		4		true	beer, beverage	https://im
4	9588757	Flensburger Wasser	1	Beer		3.99		true	beer, beverage	https://im
5	MRCT	Mark Ruffalo Squeaky Toy	SDPS	SnorkaDog Pet Supplies		10.95		true	Chew Toy, Dog	
6	MTDB	Miles Terrier Dog Bones	SDPS	SnorkaDog Pet Supplies		4.79		true	Bones, Dog	
7	JGCT	Jake Gyllendog Chew Toy	SDPS	SnorkaDog Pet Supplies		10.95		true	Chew Toy, Dog	

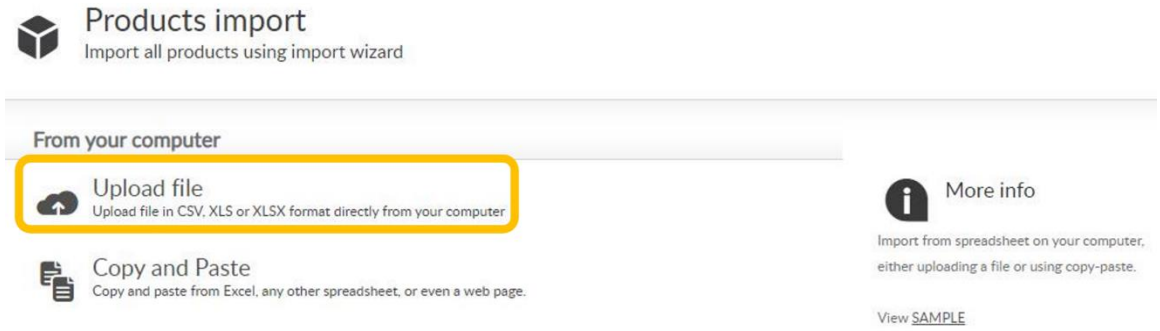
3. Once you have your completed data, **delete the three rows** at the top of the template.

	A	B	C	D	E	F	G	H	I	
1	ID	Name	Product Group ID	Product Group	Barcode	Unit price	Note	Active	Tag	Image URI
2	MRCT	Mark Ruffalo Squeaky Toy	SDPS	SnorkaDog Pet Supplies		10.95		true	Chew Toy, Dog	
3	MTDB	Miles Terrier Dog Bones	SDPS	SnorkaDog Pet Supplies		4.79		true	Bones, Dog	
4	JGCT	Jake Gyllendog Chew Toy	SDPS	SnorkaDog Pet Supplies		10.95		true	Chew Toy, Dog	

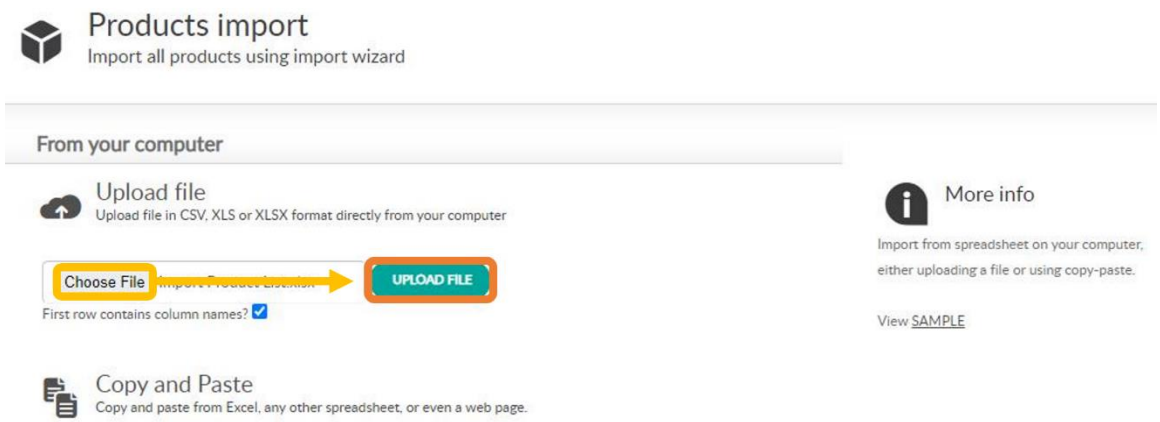
4. **Save** the file.

## Upload the Template

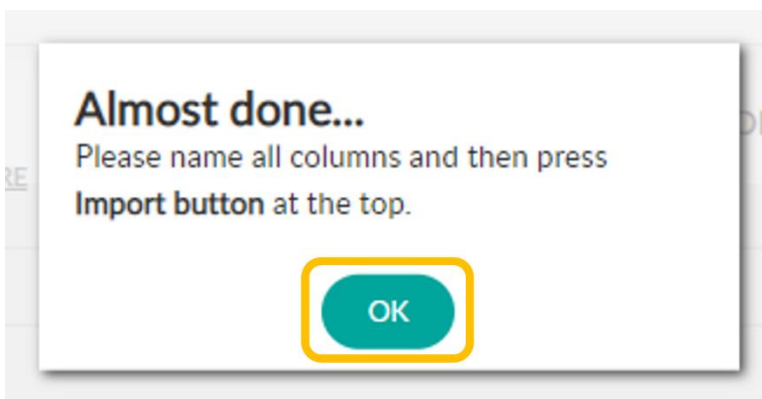
1. Click **Upload file**.



2. Click **Choose File** > select the file > click **Open** > click **Upload File**.



3. Click **OK**.



- To change your header name, click **Edit** > click the **down arrow**> select the **correct header name**.

Select columns to import  
Choose column names for import. Columns you ignore will remain intact.

**IMPORT** Cancel

ID ⓘ	PRODUCT ⓘ	PRODUCT GROUP ID ⓘ	PRODUCT GROUP ⓘ	BARCODE ⓘ	UNIT PRICE ⓘ	NOTE ⓘ
<b>EDIT</b> <b>IGNORE</b>	<b>EDIT</b> <b>IGNORE</b>	<b>EDIT</b> <b>IGNORE</b>	<b>EDIT</b> <b>IGNORE</b>	<b>EDIT</b> <b>IGNORE</b>	<b>EDIT</b> <b>IGNORE</b>	<b>EDIT</b> <b>IGNORE</b>
MRCT		DPS	SnorkaDog Pet Supplies		10.95	
MTDB		DPS	SnorkaDog Pet Supplies		4.79	
JGCT		DPS	SnorkaDog Pet Supplies		10.95	

ID \*

ID \*

Product \*

Product group ID

Product group

Barcode

Unit price

Note

Active

Image URL

Tag

Master product

- Click **Ignore** if you do not want to import that column.

Select columns to import  
Choose column names for import. Columns you ignore will remain intact.

**IMPORT** Cancel

ID ⓘ	NAME ⓘ	STREET ADDRESS ⓘ	ZIP ⓘ	ZIP EXT ⓘ	CITY ⓘ	STATE ⓘ
<b>EDIT</b> <b>IGNORE</b>	<b>EDIT</b> <b>IGNORE</b>	<b>EDIT</b> <b>IGNORE</b>	<b>EDIT</b> <b>IGNORE</b>	<b>EDIT</b> <b>IGNORE</b>	<b>EDIT</b> <b>IGNORE</b>	<b>EDIT</b> <b>IGNORE</b>
16	ALDI	10950 San Jose Blvd	32223		Jacksonville	FL
17	Walmart Supercenter	10991 San Jose Blvd Ste 1	32223		Jacksonville	FL
18	Trader Joe's	11112 San Jose Blvd	32223		Jacksonville	FL

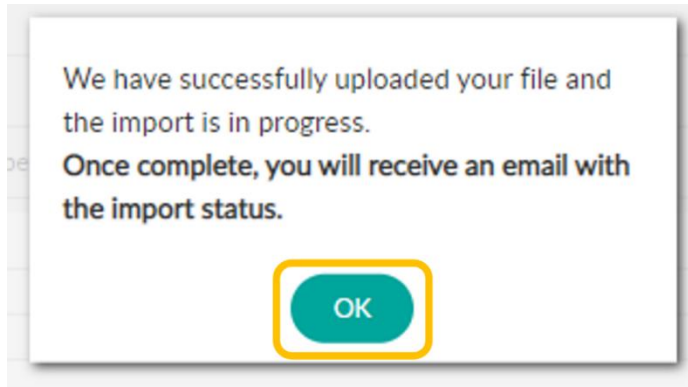
- Click **Import**.

Select columns to import  
Choose column names for import. Columns you ignore will remain intact.

**IMPORT** Cancel

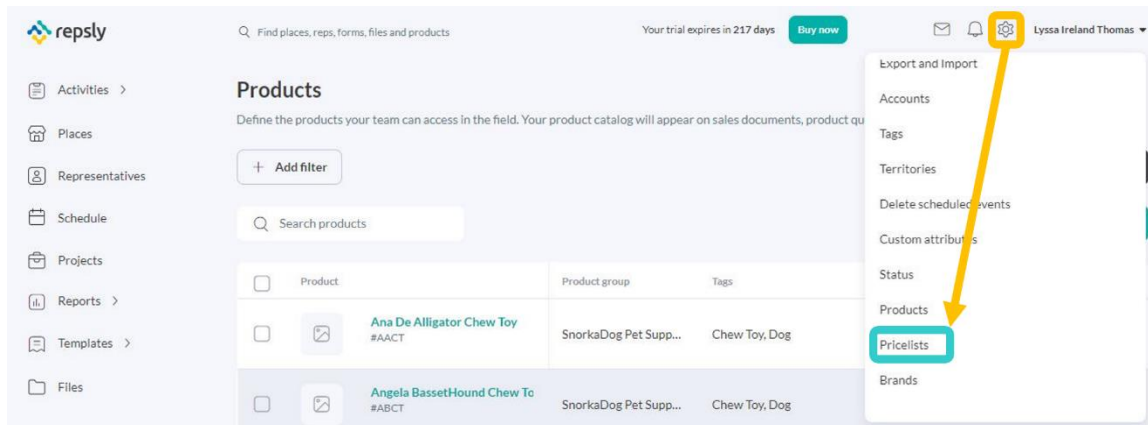
ID ⓘ	NAME ⓘ	STREET ADDRESS ⓘ	ZIP ⓘ	ZIP EXT ⓘ	CITY ⓘ	STATE ⓘ
<b>EDIT</b> <b>IGNORE</b>	<b>EDIT</b> <b>IGNORE</b>	<b>EDIT</b> <b>IGNORE</b>	<b>EDIT</b> <b>IGNORE</b>	<b>EDIT</b> <b>IGNORE</b>	<b>EDIT</b> <b>IGNORE</b>	<b>EDIT</b> <b>IGNORE</b>
16	ALDI	10950 San Jose Blvd	32223		Jacksonville	FL
17	Walmart Supercenter	10991 San Jose Blvd Ste 1	32223		Jacksonville	FL
18	Trader Joe's	11112 San Jose Blvd	32223		Jacksonville	FL

7. You will receive a progress message. Click **OK**.

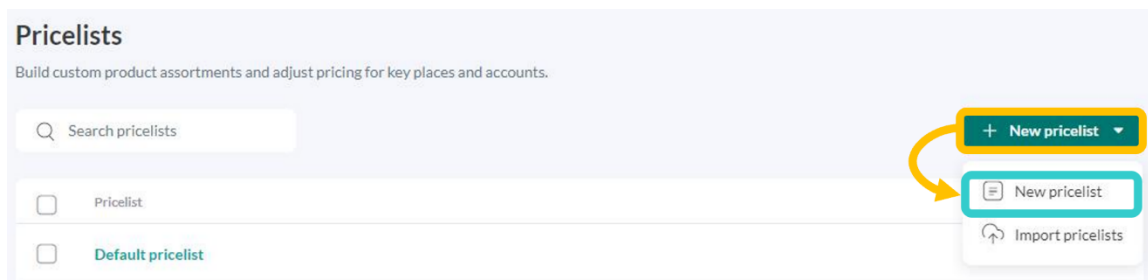


## Add a Pricelist to Repsly

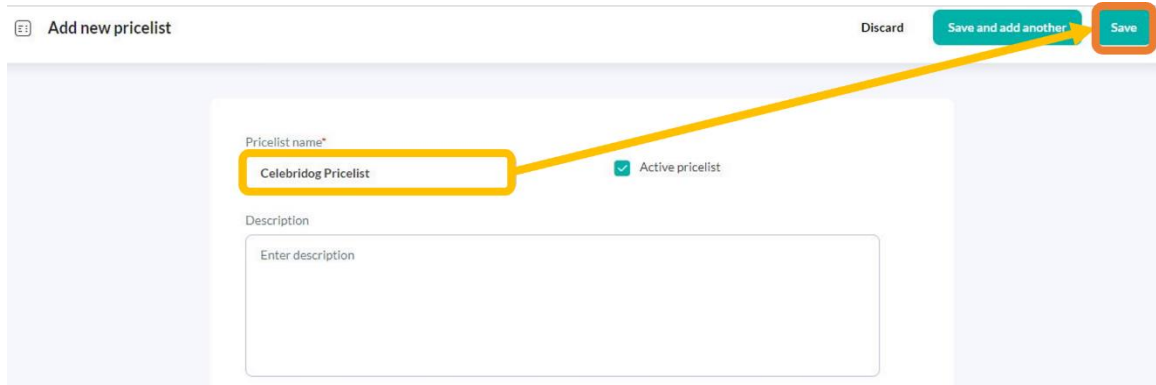
1. Click the **Gear** icon > select **Pricelists**.



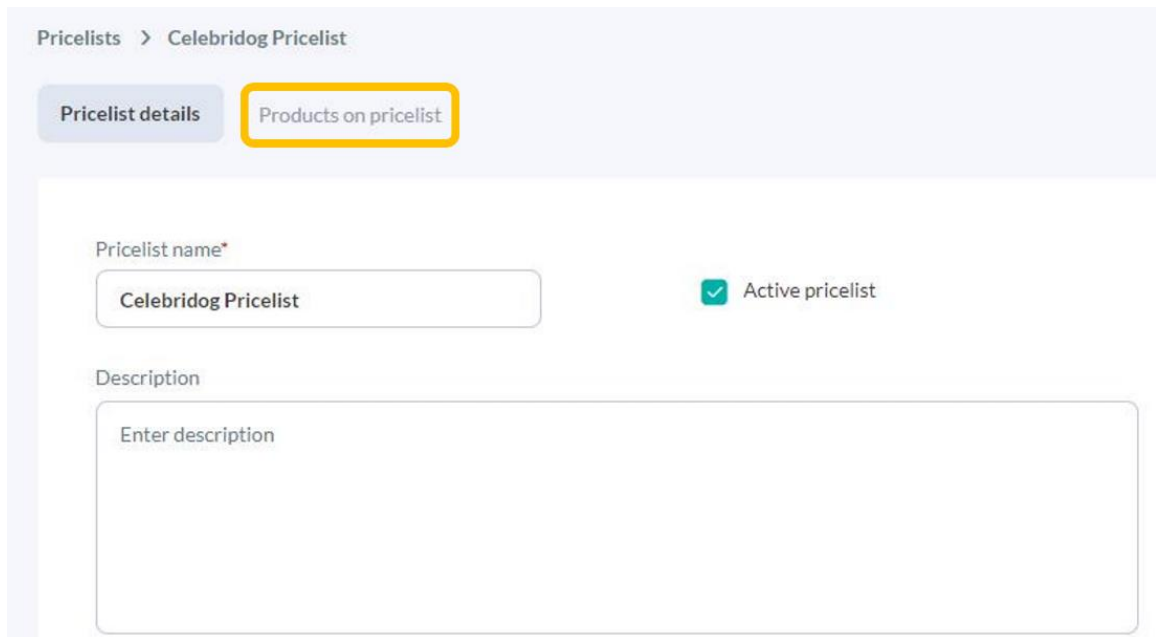
2. Click **+ New Pricelist** > select **New Pricelist**.



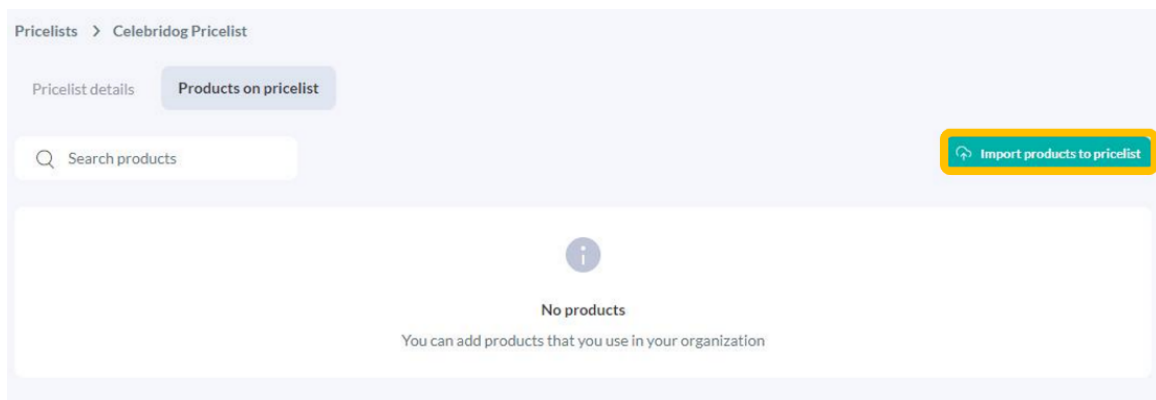
3. Enter the **Pricelist Name** > click **Save**.



4. Click **Products on Pricelist**.



5. Click **Import Products to Pricelist**.



6. Take the list of products you want to import, and make sure to keep the following columns with the **correct column names** for the import:
  - a. Product ID
  - b. Product Price
  - c. Active

	A	B	C
1	Product ID	Product Price	Active
2	AACT	10.95	True
3	ABCT	10.95	True
4	BCDP	7.95	True
5	BPDD	6.79	True
6	CZBBones	4.79	True
7	CHCT	10.95	True

7. Click **Upload file**.

Pricelist 'Celebridog Pricelist' import  
 Import 'Celebridog Pricelist' pricelist using import wizard

**From your computer**

**Upload file**  
Upload file in CSV, XLS or XLSX format directly from your computer

**Copy and Paste**  
Copy and paste from Excel, any other spreadsheet, or even a web page.

**More info**  
Import from spreadsheet on your computer, either uploading a file or using copy-paste.

View [SAMPLE](#)

8. Click **Choose File** > select the file > click **Open** > click **Upload File**.

Pricelist 'Celebridog Pricelist' import  
 Import 'Celebridog Pricelist' pricelist using import wizard

**From your computer**

**Upload file**  
Upload file in CSV, XLS or XLSX format directly from your computer

**Choose File** UPLOAD FILE

First row contains column names?

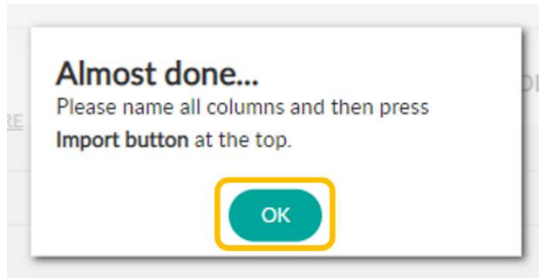
Date format (applies to CSV and TXT format only) 12/31/2023

**More info**  
Import from spreadsheet on your computer, either uploading a file or using copy-paste.

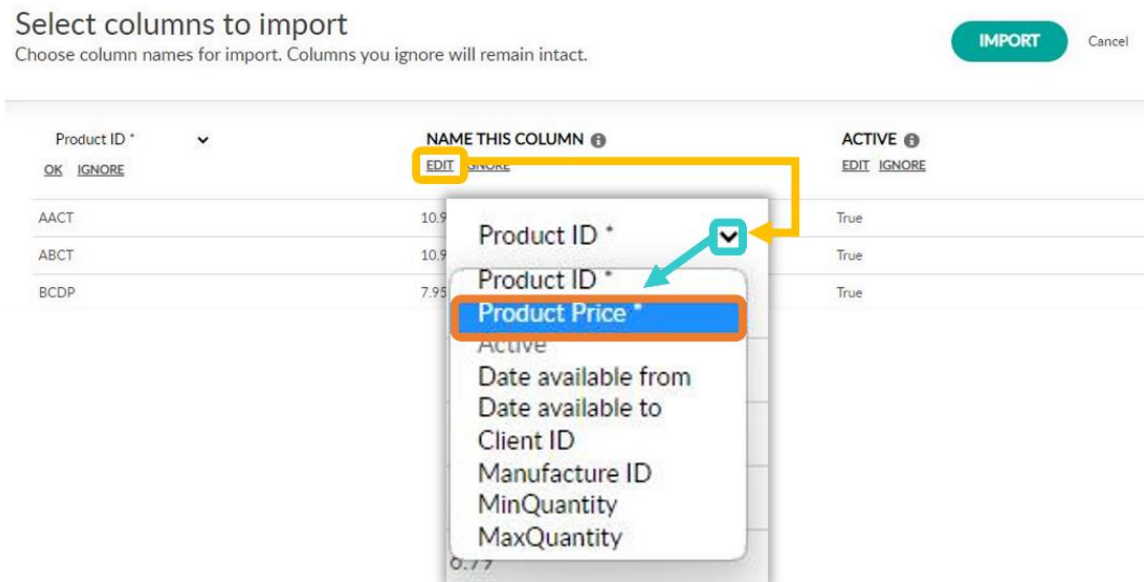
View [SAMPLE](#)



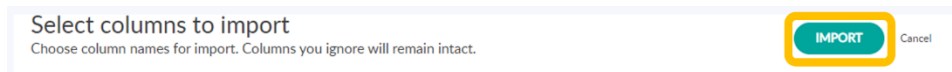
9. Click **OK**.



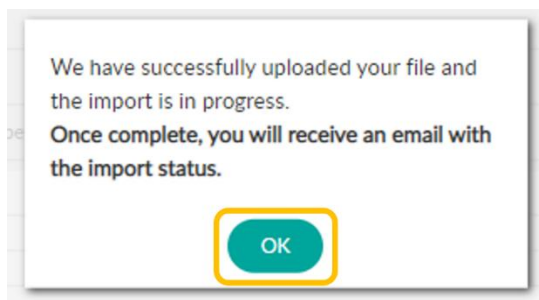
10. To change your header name, click **Edit** > click the **down arrow** > select the **correct header name** > click OK.



11. Click **Import**.

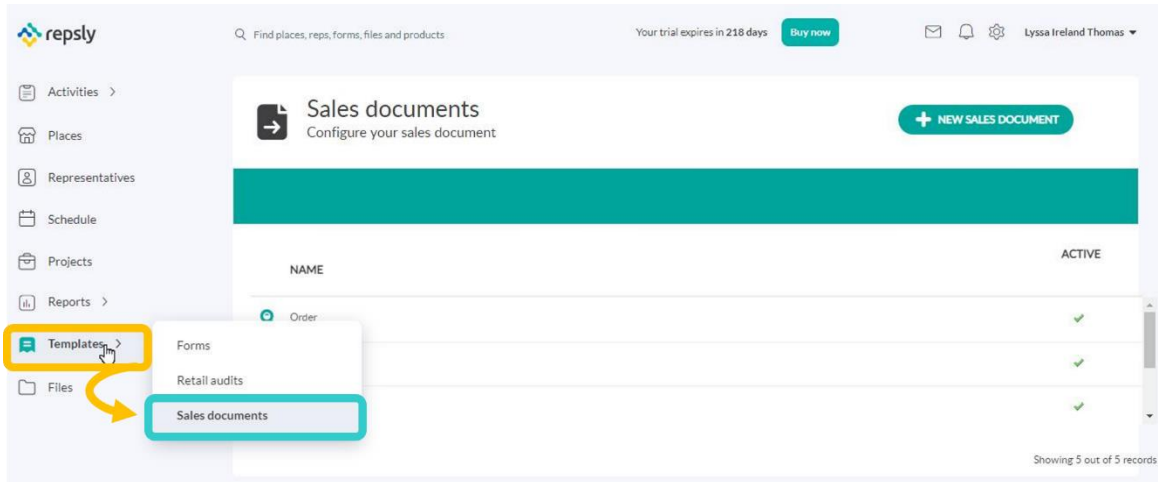


12. You will receive a progress message. Click **OK**.

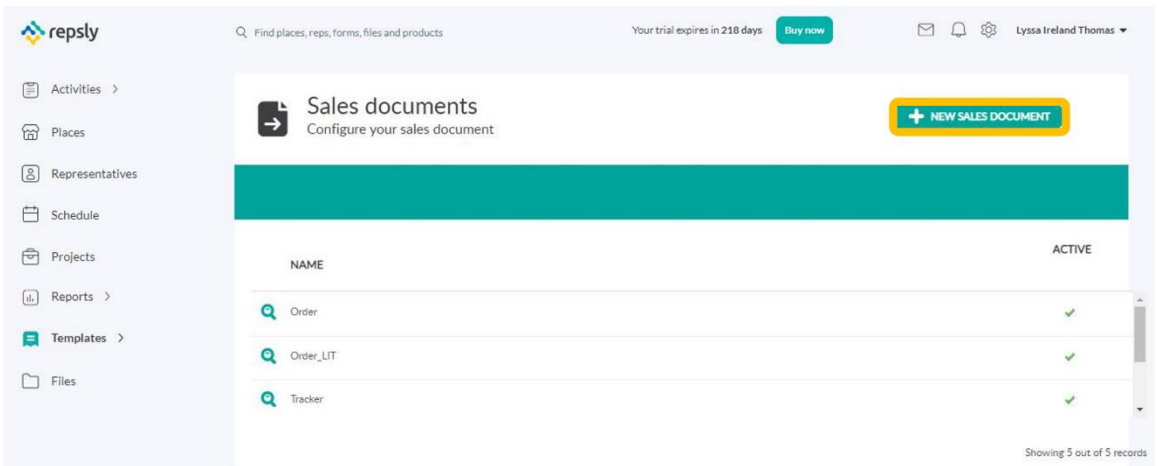


## Create a Sales Document

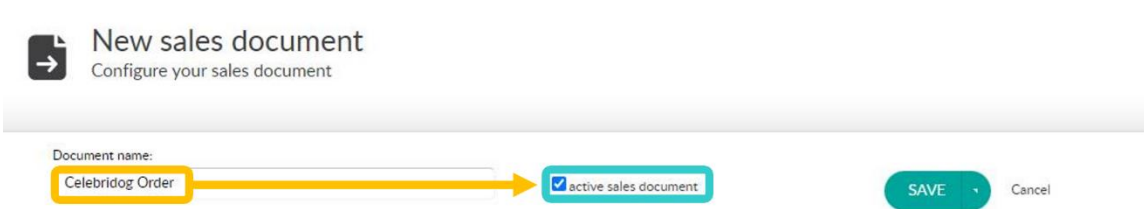
1. Click **Templates** > select **Sales Documents**.



2. Click **+ New Sales Document**.

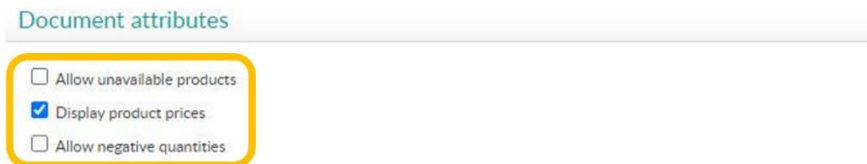


3. Enter the **Document Name** > select **Active Sales Document** to make the sales document visible on the mobile app.



4. Check the desired **Document Attributes**:

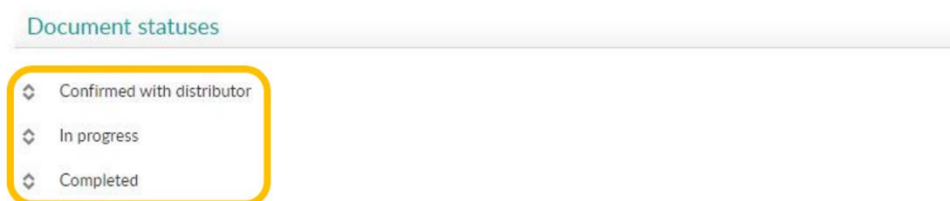
- a. Allow unavailable products
- b. Display product prices
- c. Allow negative quantities



5. Enter **Document Statuses**. This field is used when a sales document has been completed by a rep, and it requires a manager's feedback for that document. For example, if a rep completed a Returns document, their manager would select one of the following options in Repsly regarding that document:

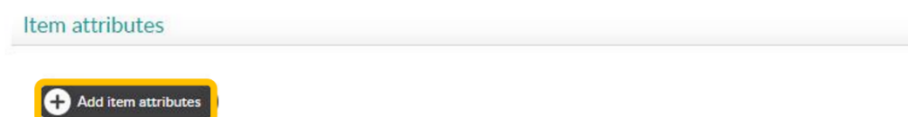
- a. Accepted
- b. Denied

In this example, the manager is going to track the progress of the order with the following options:



6. Set your **Item Attributes**. This field describes the status of items in your price list. For example, you are tracking product returns in Repsly, but you want to know the reason for the return.

- a. Click **+ Add item Attributes**.



b. Enter the name of the **Attribute** > click **Mandatory** if desired.

Item attributes

Reason for Return MANDATORY

c. Enter the **associated options** to the **item attribute**.

Reason for Return MANDATORY

- ◇ Damaged Product
- ◇ Damaged Packaging
- ◇ Expired Product

7. Enter **Custom Document Fields** > click **Mandatory** for items required to fill out. Some examples include:

- a. When the order was taken
- b. When the order was processed
- c. Who approved the order
- d. Other information relevant to your business

Custom document fields

Deleting or adding fields will affect all your sales documents.

Who approved the order? MANDATORY

+ Add new field

8. Click **Save**.

New sales document  
Configure your sales document

Document name:   active sales document SAVE Cancel

9. Click **Choose Pricelist**.

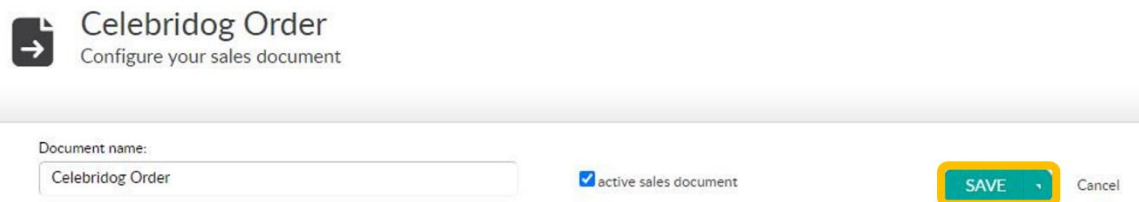


10. Click the **Pricelist** > click **Save**.

Assign price lists to this sales document



11. Once finished setting up the sales document, click **Save**.



**Note:** once your team performs a pull-down to refresh their mobile apps, these documents will be visible under Sales Documents below Orders.