Welcome to Repsly U!

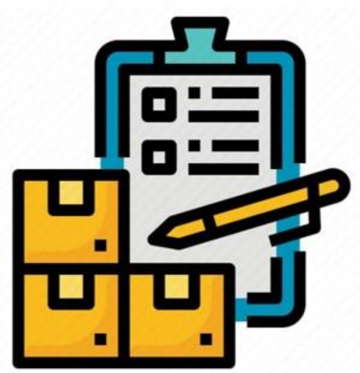
What is a Sales Document?

Why work with Sales Documents?

Why work with Sales Documents?

To stay on top of the following:

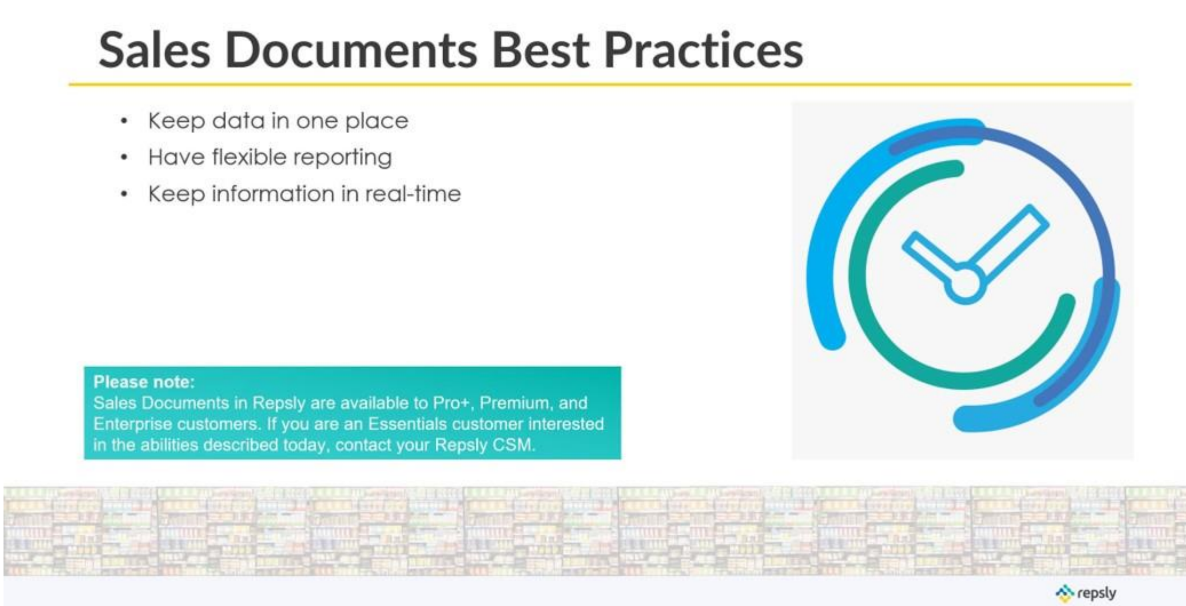
- Inventory on Hand
  - On shelf
  - Backstock
- Low Stock
- Product Performance
- Sales Summary
- Sales Report
  - By Product
  - By Product Type



Why work with Sales Documents?

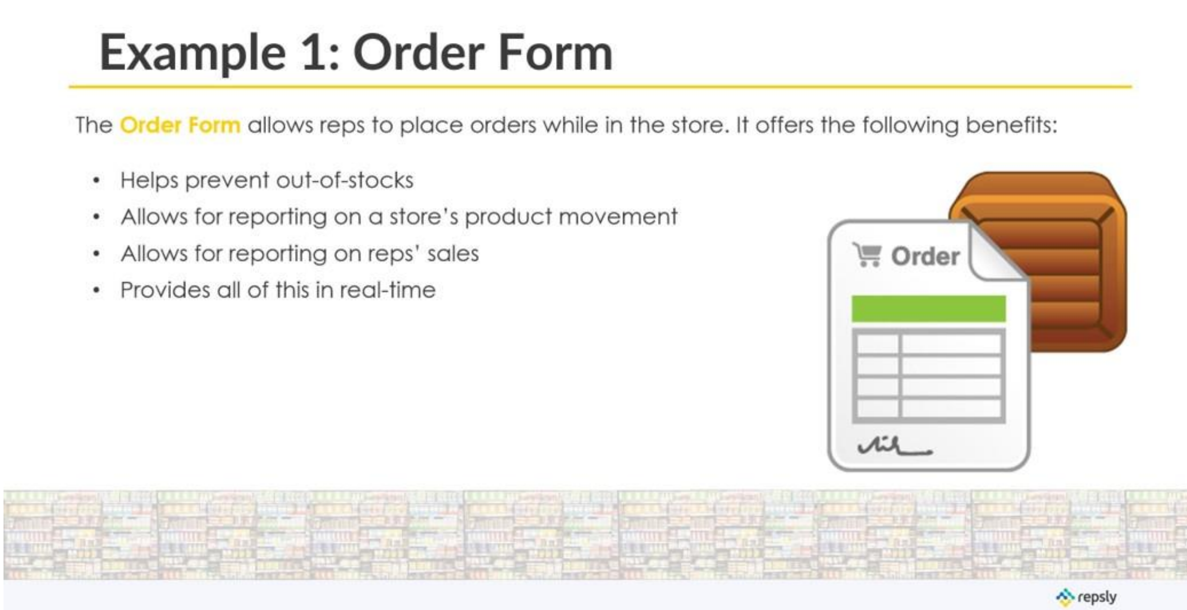
- Sales Report
  - By Customer
  - By Customer Group
- Sell-Through Report

Sales Documents Best Practices

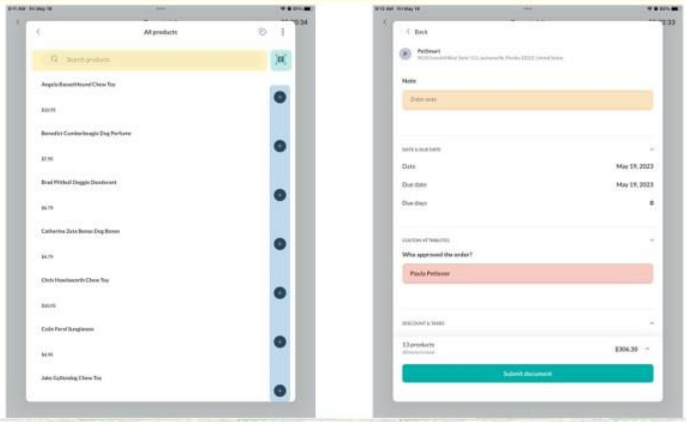


Examples:

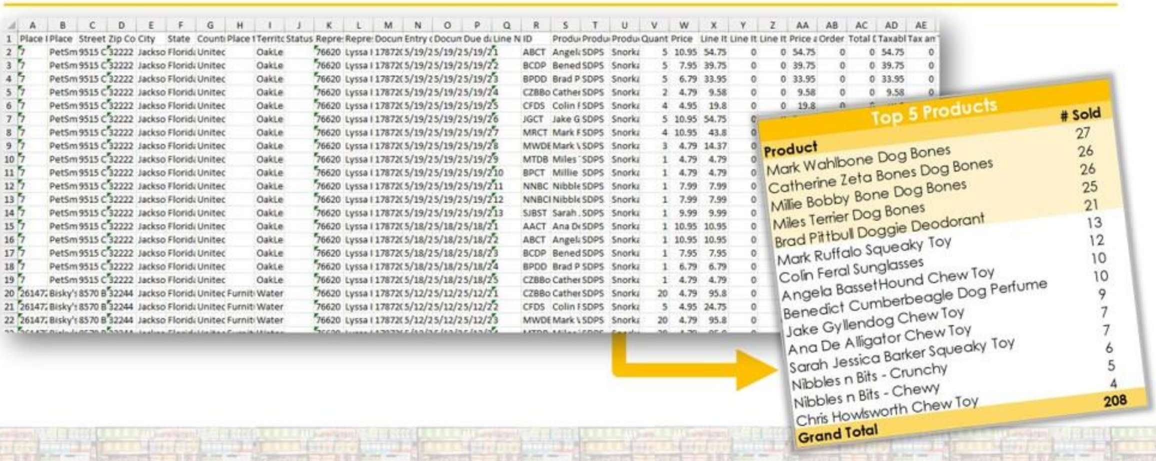
Order Form



Order Form: View from the Mobile App



Order Form: Reporting Example



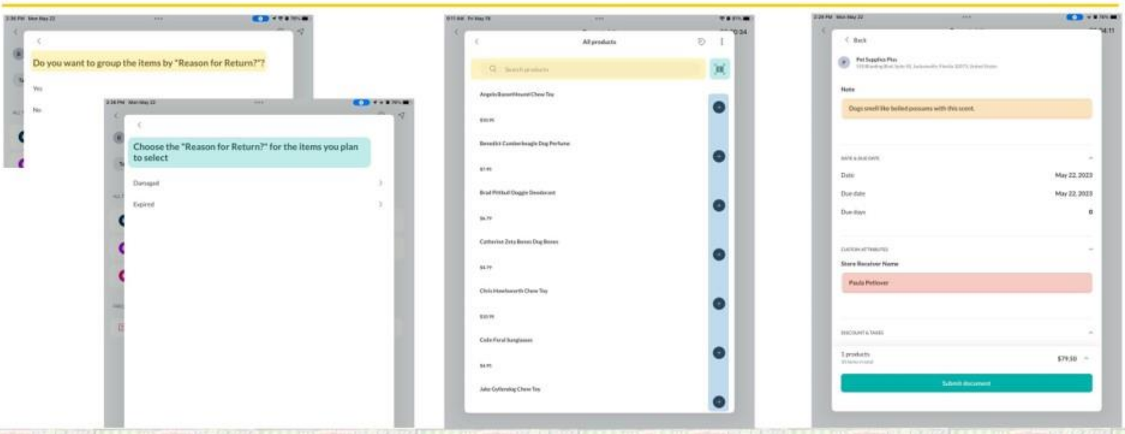
Returns

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	Repre:	Repre:	Docum	Entry (	Docum	Due d:	Line N	ID	Produ	Produ	Produ	Quant	Price	Line It	Line It	Line It	Price a	Order	Total [	Taxabl	Tax an	Total	Note	Sales (	Barcoc	Sales (	Sales (	Reaso	Deli M	Deli M
2		76620	Lyssa I	17872(	5/19/2	5/19/2	5/19/2	1	AACT	Ana D	SDPS	Snorka	1	10.95	10.95	0	0	10.95	0	0	10.95	0	10.95				Return		Damag		
3		76620	Lyssa I	17872(	5/19/2	5/19/2	5/19/2	2	ABCT	Angel	SDPS	Snorka	2	10.95	21.9	0	0	21.9	0	0	21.9	0	21.9				Return		Damag		
4		76620	Lyssa I	17872(	5/19/2	5/19/2	5/19/2	3	SJBST	Sarah .	SDPS	Snorka	5	9.99	49.95	0	0	49.95	0	0	49.95	0	49.95				Return		Damag		
5		76620	Lyssa I	17872(	5/19/2	5/19/2	5/19/2	1	BPDD	Brad P	SDPS	Snorka	1	6.79	6.79	0	0	6.79	0	0	6.79	0	6.79				Return		Damag	Fred S	8 am -
6		76620	Lyssa I	17872(	5/19/2	5/19/2	5/19/2	2	CFDS	Colin F	SDPS	Snorka	4	4.95	19.8	0	0	19.8	0	0	19.8	0	19.8				Return		Damag	Fred S	8 am -
7		76620	Lyssa I	17872(	5/19/2	5/19/2	5/19/2	3	MTDB	Miles '	SDPS	Snorka	1	4.79	4.79	0	0	4.79	0	0	4.79	0	4.79				Return		Damag	Fred S	8 am -
8		76620	Lyssa I	17872(	5/19/2	5/19/2	5/19/2	4	BPDD	Brad P	SDPS	Snorka	-1	6.79	-6.79	0	0	-6.79	0	0	-6.79	0	-6.79				Return		Expire	Fred S	[illegible]
9		76620	Lyssa I	17872(	5/19/2	5/19/2	5/19/2	5	CZBBo	Cather	SDPS	Snorka	1	4.79	4.79	0	0	4.79	0	0	4.79	0	4.79				Return		[illegible]		
10		76620	Lyssa I	17872(	5/19/2	5/19/2	5/19/2	6	NNBC	Nibble	SDPS	Snorka	2	7.99	15.98	0	0	15.98	0	0	15.98	0	15.98				[illegible]				

Top Products Returned

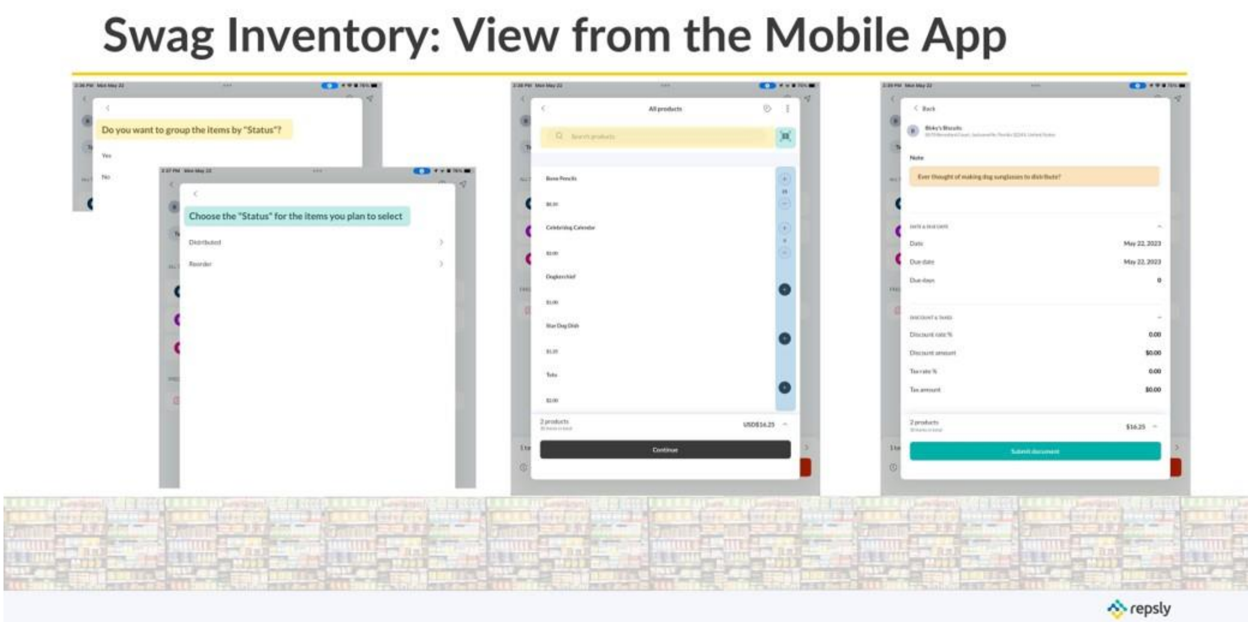
Product	# Returned
Sarah Jessica Barker Squeaky Toy	5
Colin Feral Sunglasses	4
Angela BassetHound Chew Toy	2
Nibbles n Bits - Chewy	2
Ana De Alligator Chew Toy	1
Catherine Zeta Bones Dog Bones	1
Miles Terrier Dog Bones	1
Brad Pittbull Doggie Deodorant	0
Grand Total	**16**

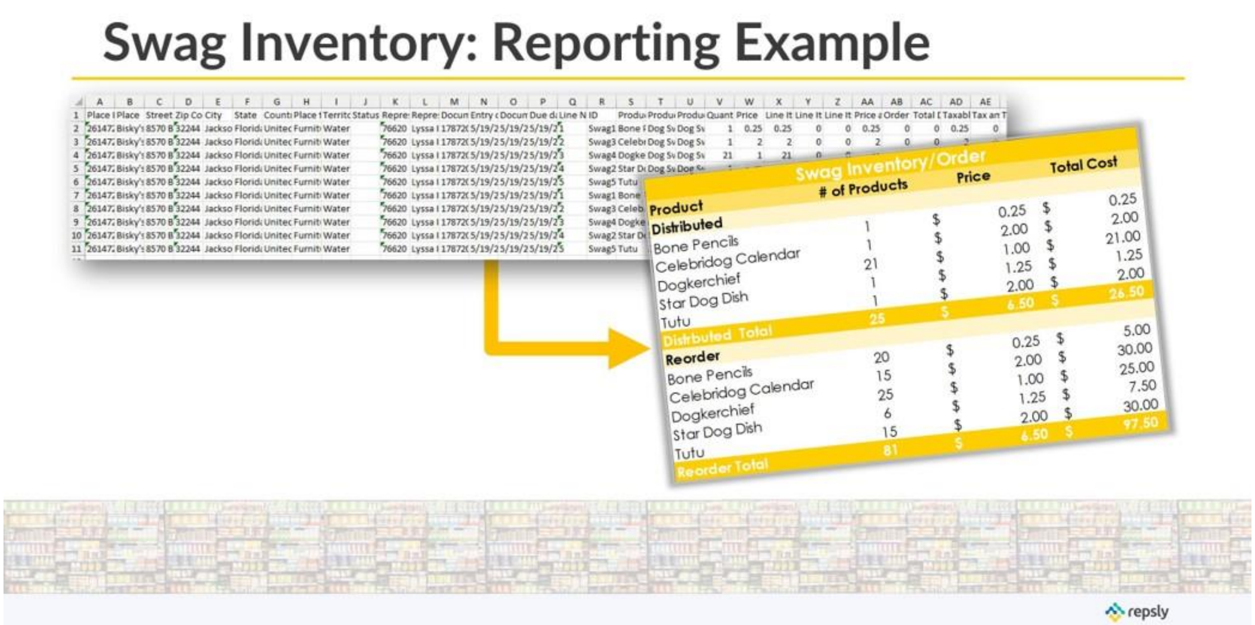
Swag Inventory

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
Do you want to group the items by "Status"?
Yes
No
Choose the "Status" for the items you plan to select
Distributed
Reorder
All products
Bone Pencils
Celebridog Calendar
Dogkerchief
Star Dog Dish
Tutu
Continue
Note
Ever thought of making dog sunglasses to distribute?
Submit document
repsly


Swag Inventory: Reporting Example
Swag Inventory/Order
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
Distributed Total 25 $ 6.50 $ 26.50
Reorder
Bone Pencils 20 $ 0.25 $ 5.00
Celebridog Calendar 15 $ 2.00 $ 30.00
Dogkerchief 25 $ 1.00 $ 25.00
Star Dog Dish 6 $ 1.25 $ 7.50
Tutu 15 $ 2.00 $ 30.00
Reorder Total 81 $ 6.50 $ 97.50
repsly

How to Create a Sales Document in Repsly

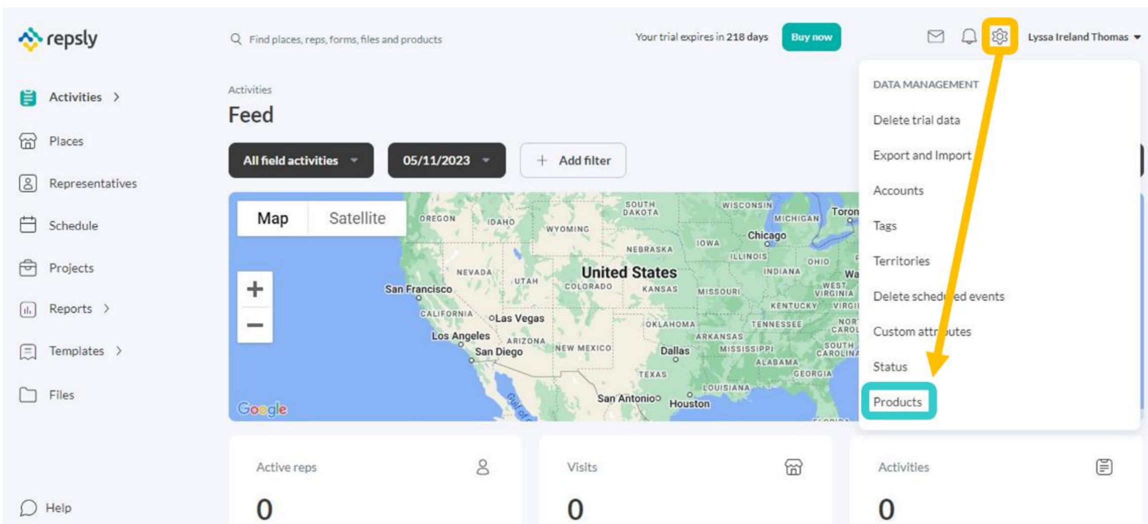
Before creating your Sales Document, you need to complete the following tasks in Repsly:

1. Add Products
2. Add Pricelist

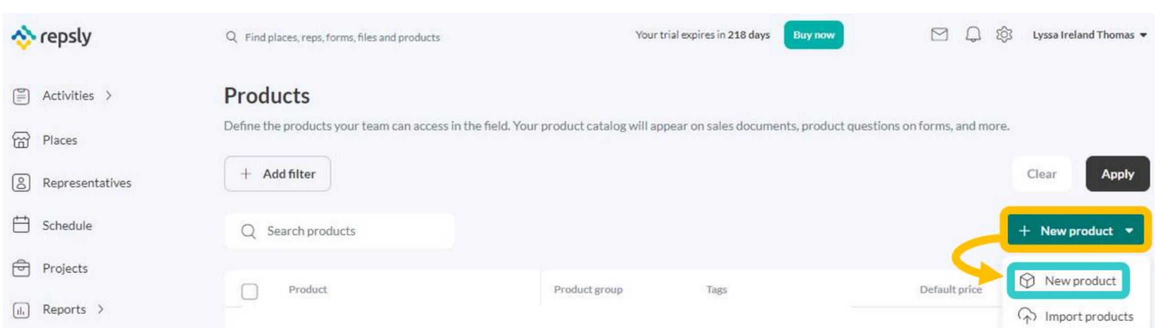
Add Products to Repsly (2 Methods)

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:

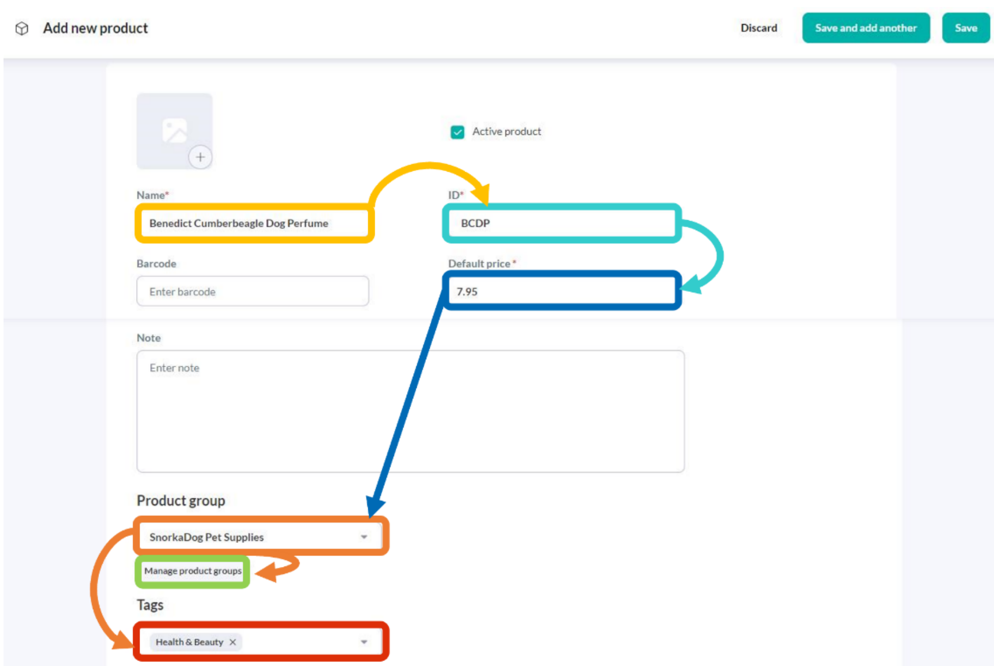
a. Name

b. ID

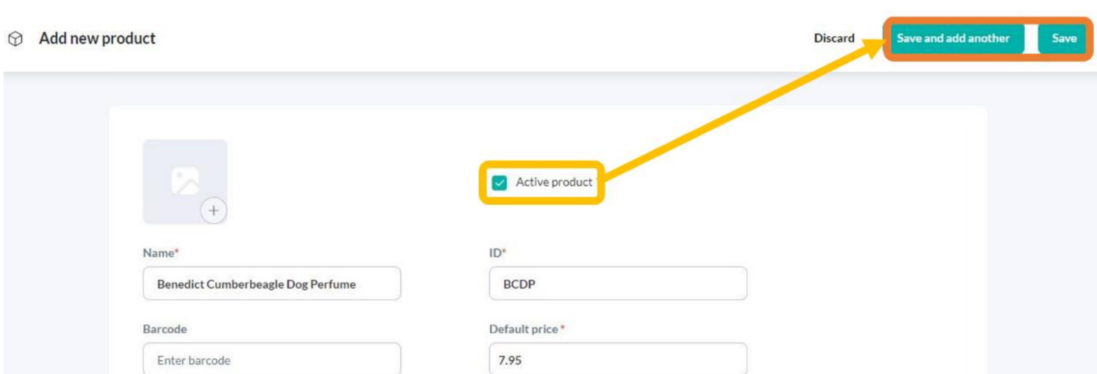
c. Default Price

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.



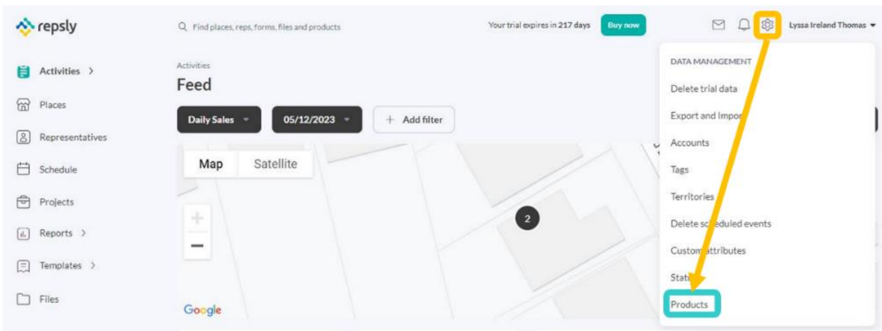
4. Make sure Active is checked > click Save.



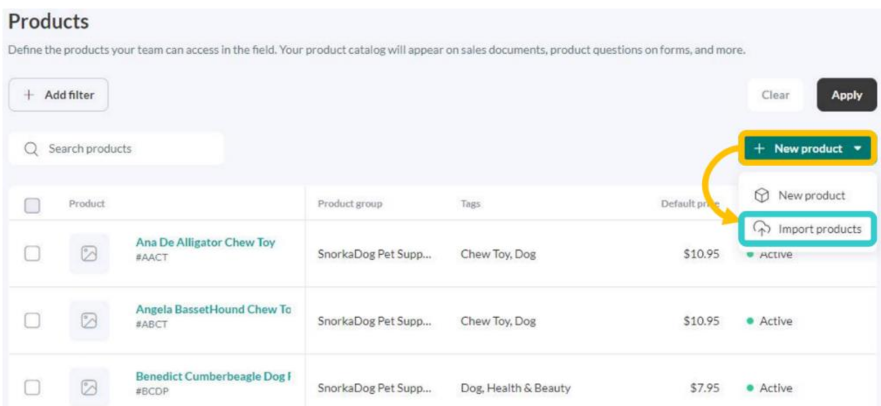
Method 2: Importing Products

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**.



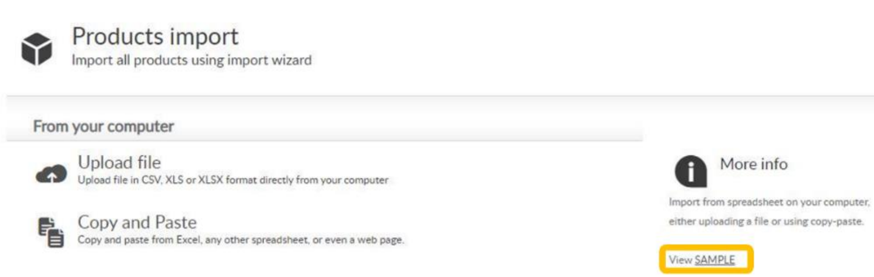
2. Click **+ New Product** > select **Import Products**.



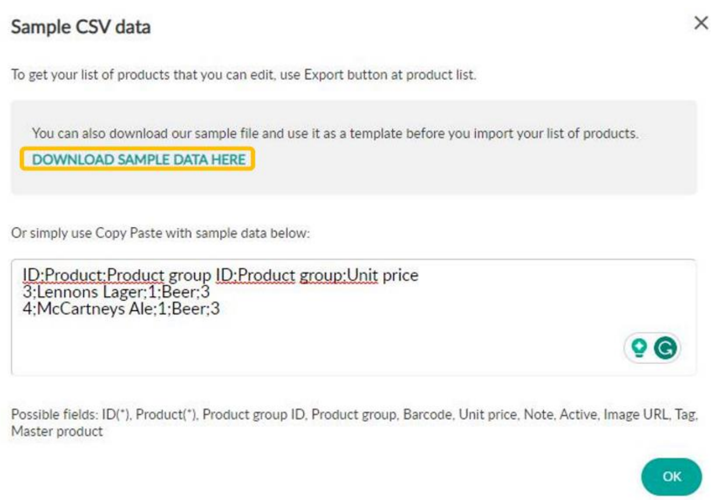
Download the Sample Template

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**.



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 URl
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	

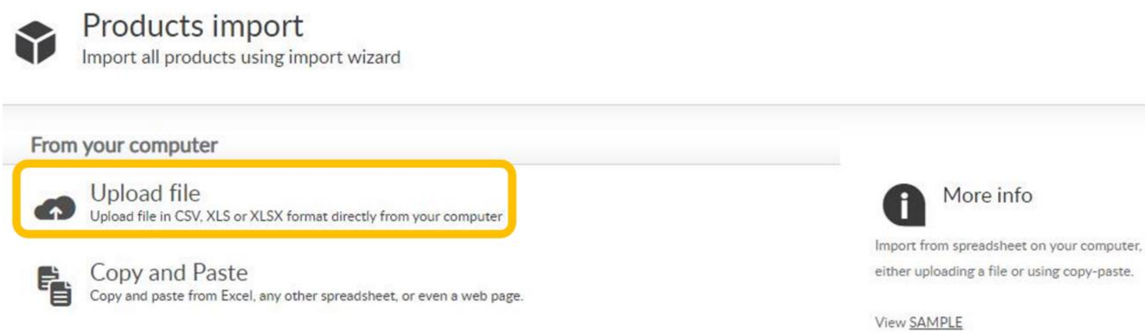
3. Once you have your completed data, **delete the three rows** at the top of the template.

	A	B	C	D	E	F	G	H	I	
1	ID	Name	Product Group ID	Product Group	Barcode	Unit price	Note	Active	Tag	Image URL
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	

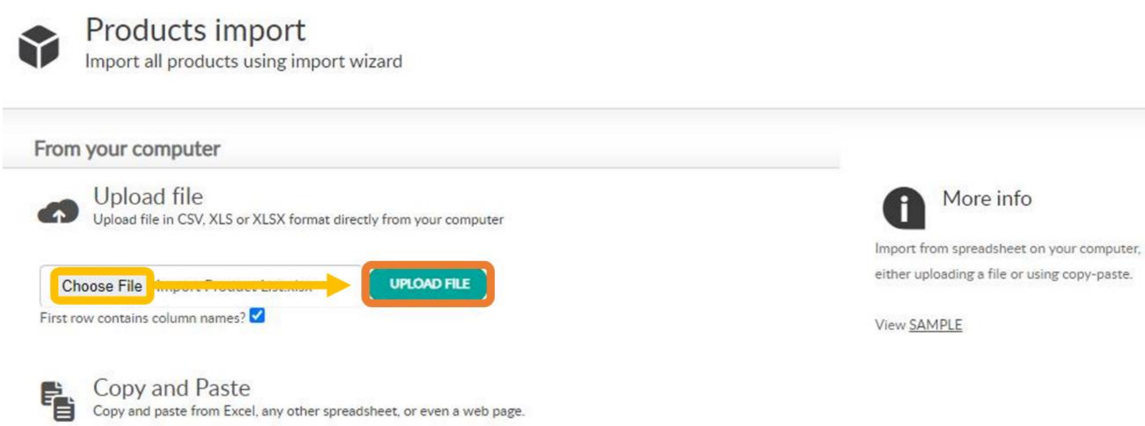
4. **Save** the file.

Upload the Template

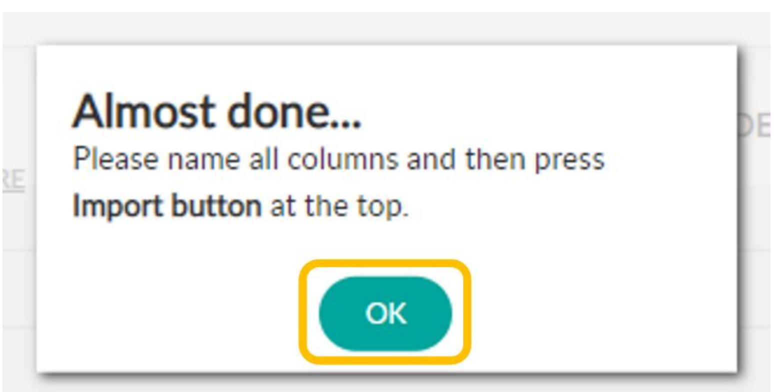
1. Click **Upload file**.



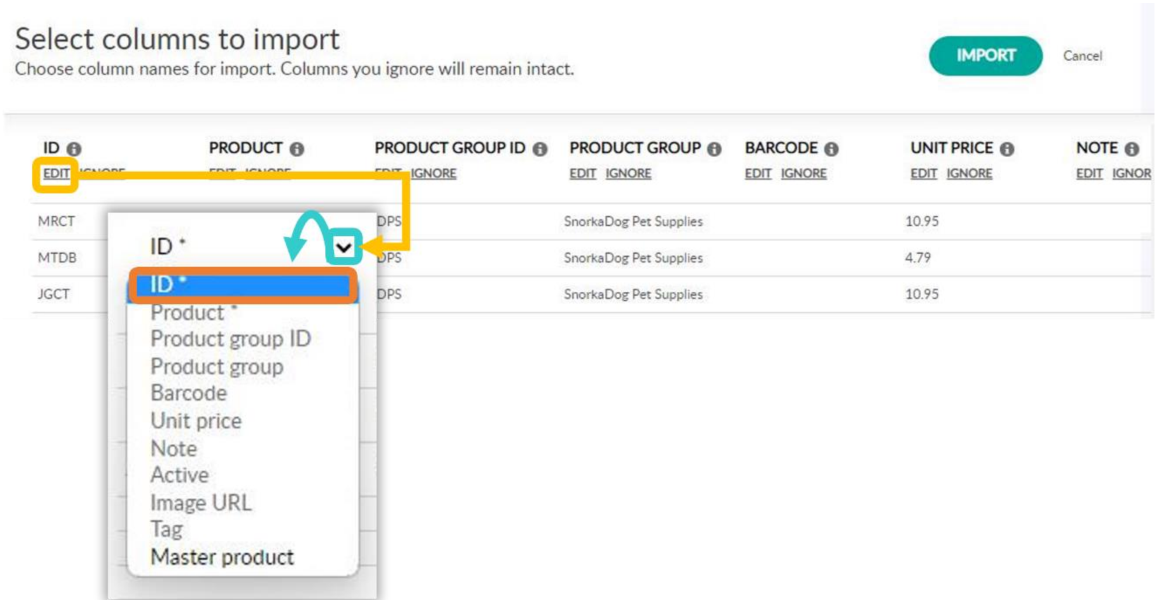
2. Click **Choose File** > select the file > click **Open** > click **Upload File**.



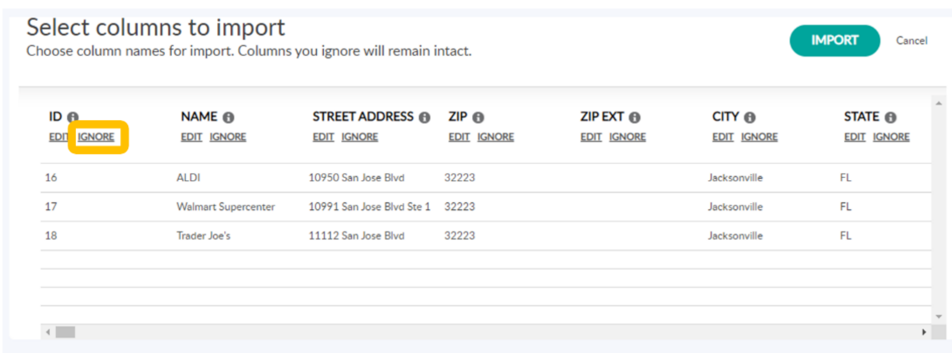
3. Click **OK**.



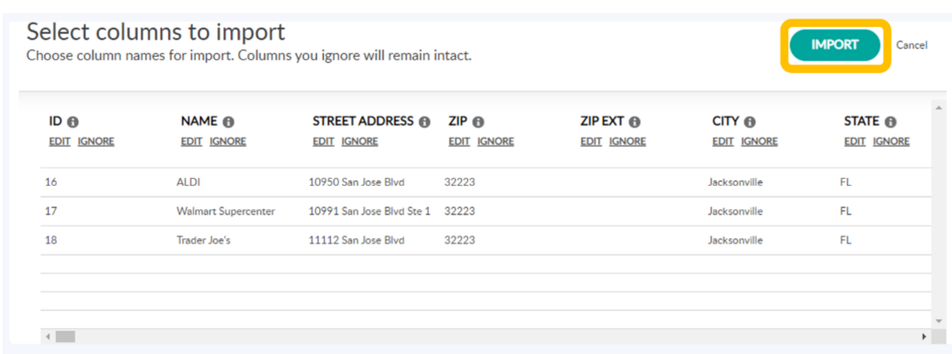
4. To change your header name, click **Edit** > click the **down arrow**> select the **correct header name**.



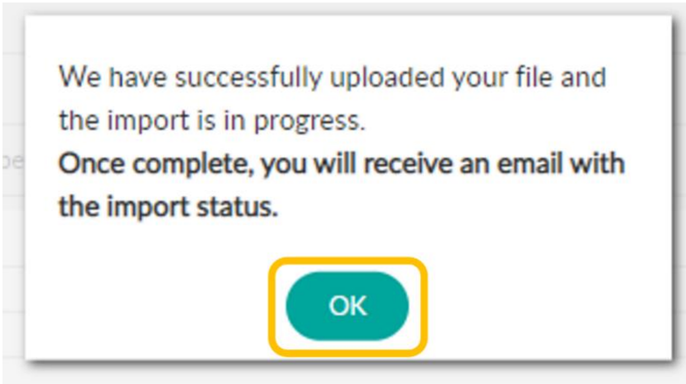
5. Click **Ignore** if you do not want to import that column.



6. Click **Import**.

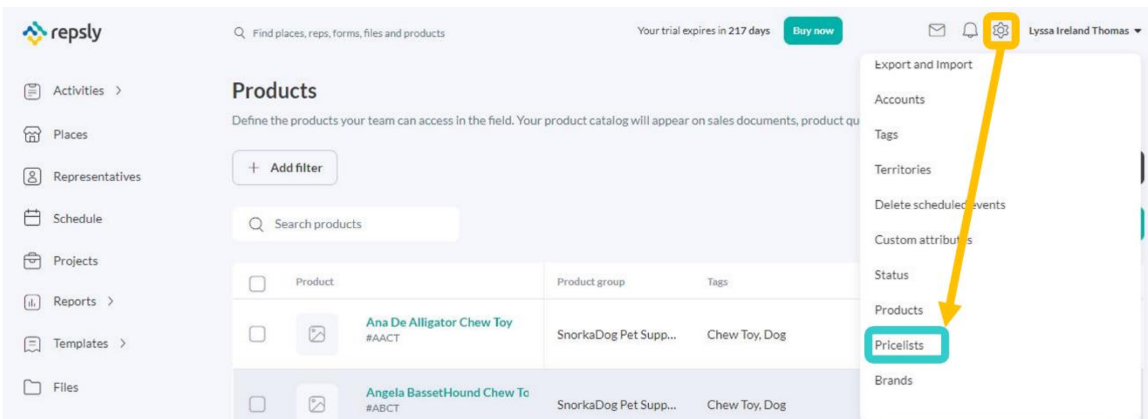


7. You will receive a progress message. Click **OK**.

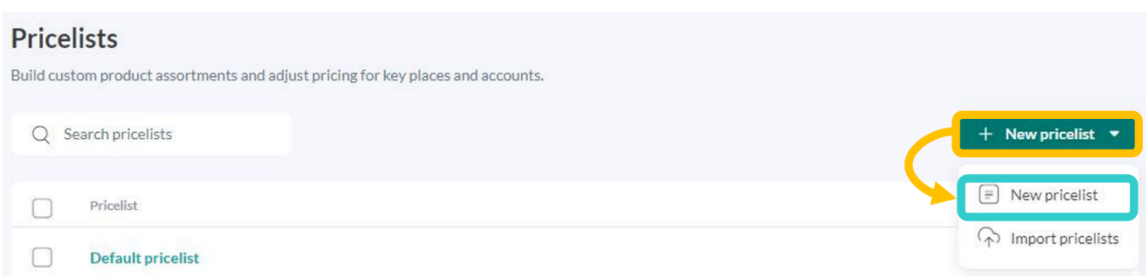


Add a Pricelist to Repsly

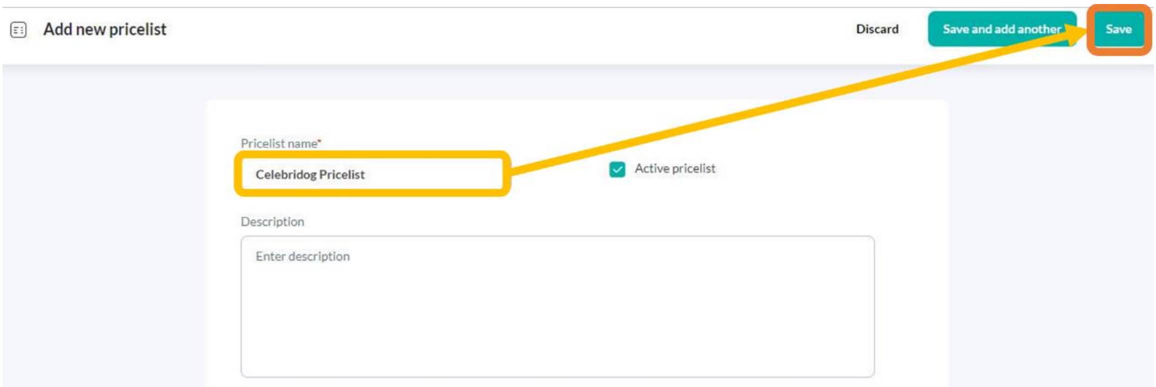
1. Click the **Gear** icon > select **Pricelists**.



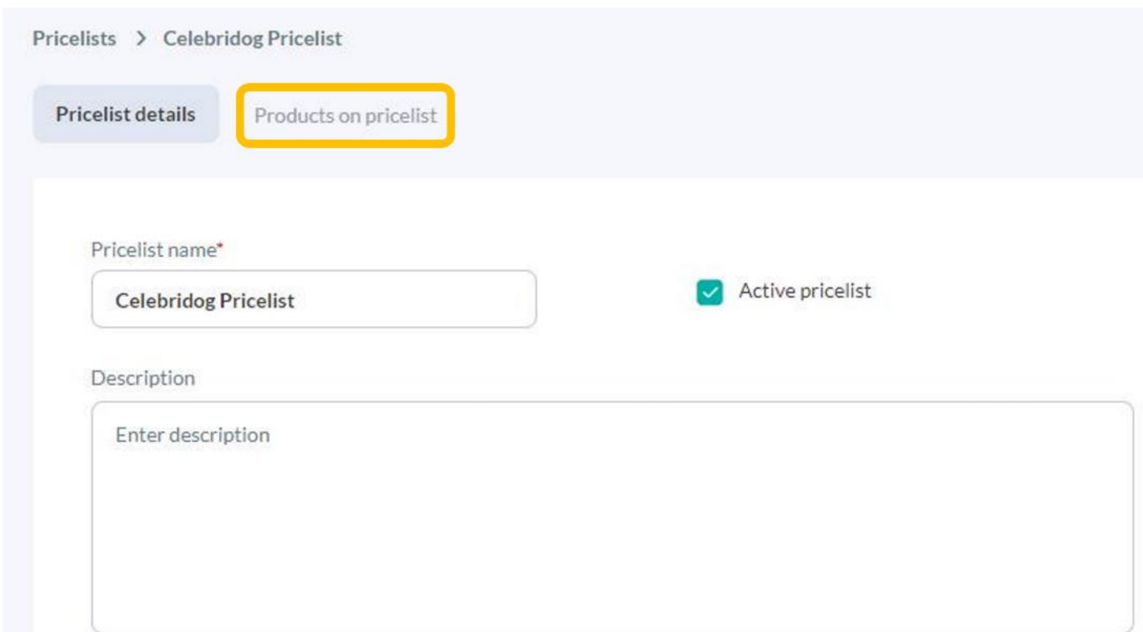
2. Click **+ New Pricelist** > select **New Pricelist.**



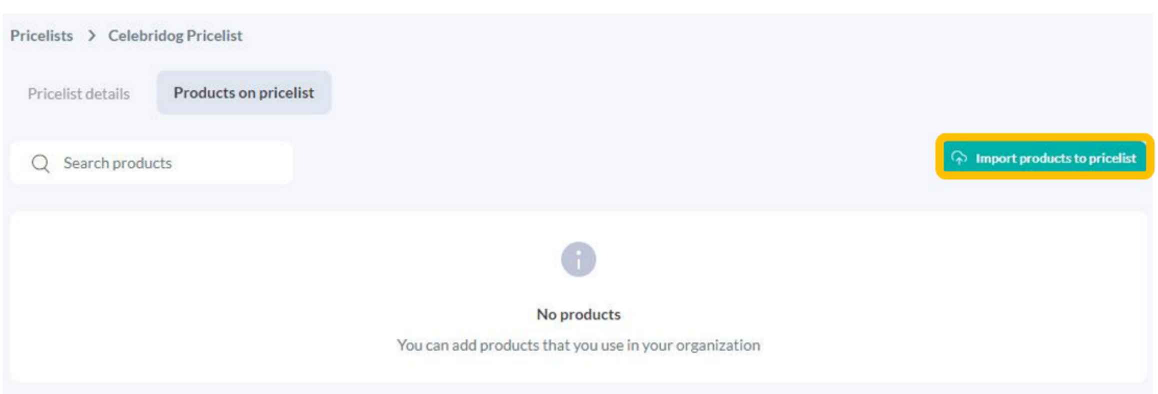
3. Enter the **Pricelist Name** > click **Save**.



4. Click **Products on Pricelist**.



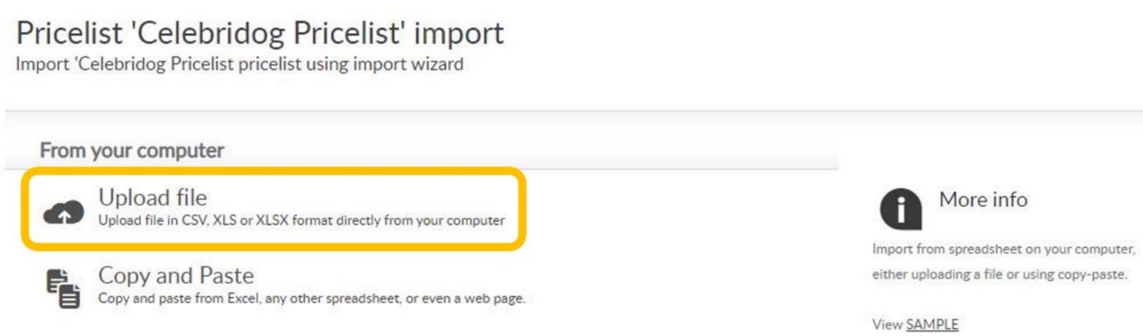
5. Click **Import Products to Pricelist**.



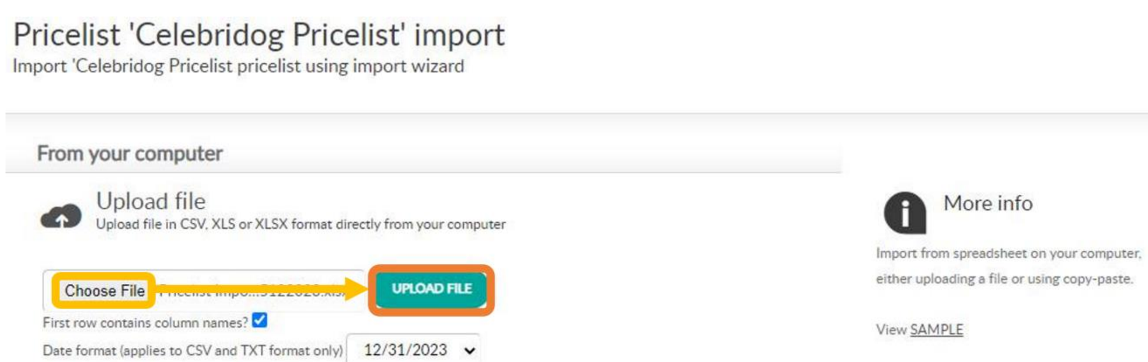
6. Take the list of products you want to import, and make sure to keep the following columns with the **correct column names** for the import:
    a. Product ID
    b. Product Price
    c. Active

	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

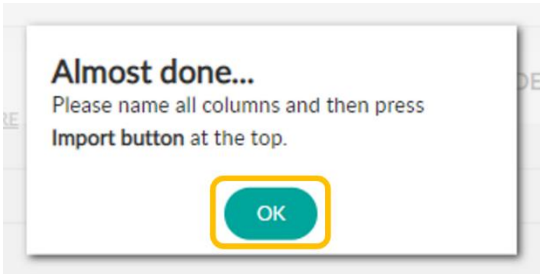
7. Click **Upload file**.



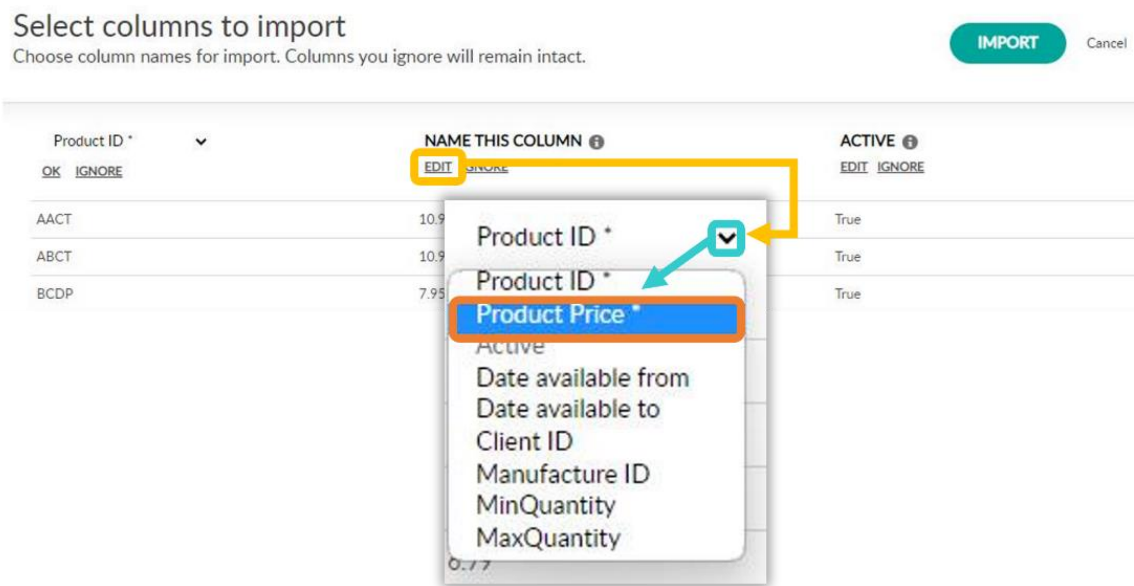
8. Click **Choose File** > select the file > click **Open** > click **Upload File**.



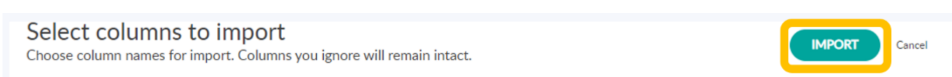
9. Click **OK**.



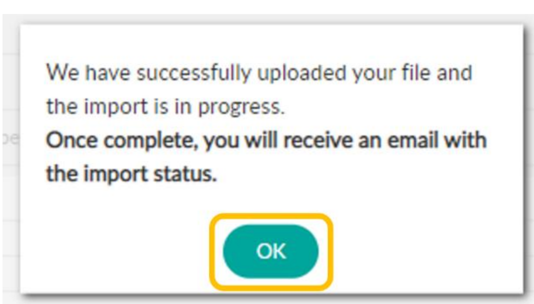
10. To change your header name, click **Edit** > click the **down arrow**> select the **correct header name** > click OK.



11. Click **Import**.

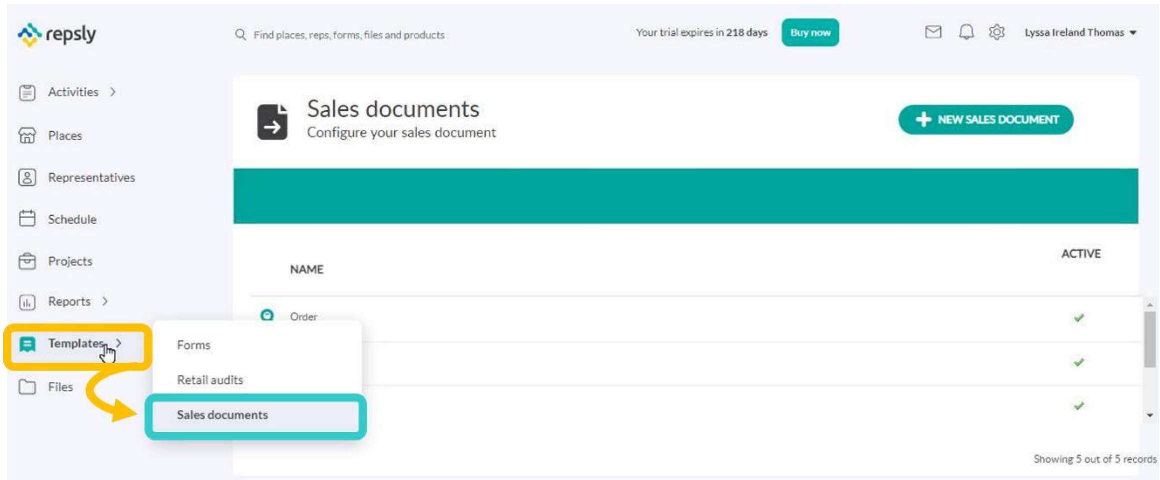


12. You will receive a progress message. Click **OK**.

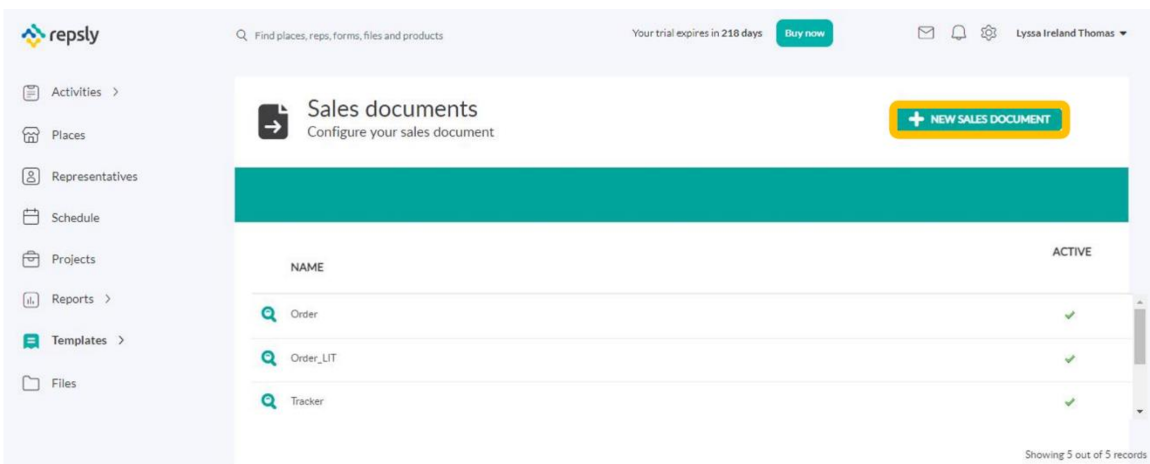


Create a Sales Document

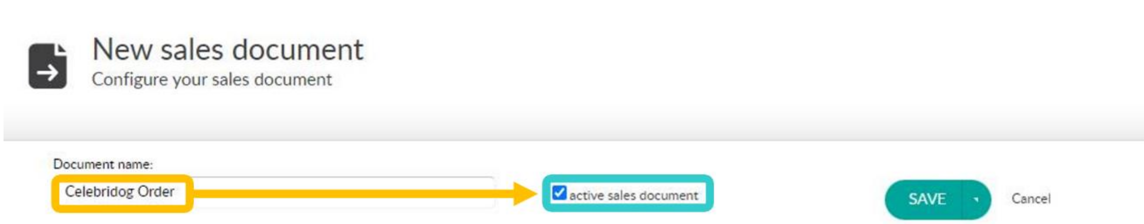
1. Click **Templates** > select **Sales Documents**.



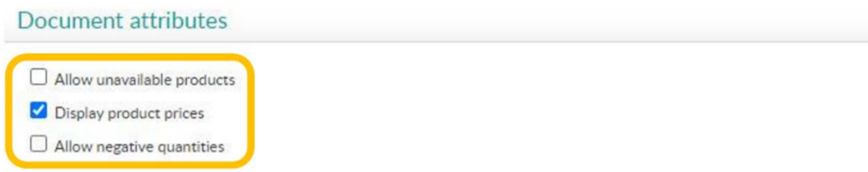
2. Click **+ New Sales Document**.



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

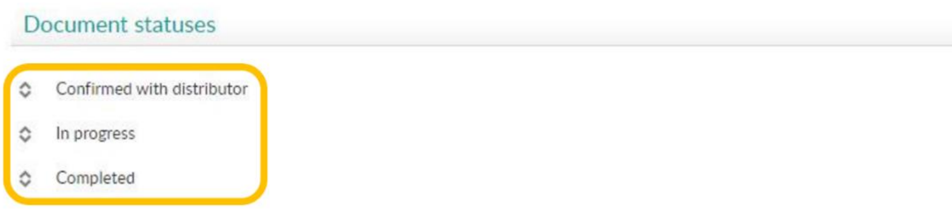


4. Check the desired **Document Attributes**:
    a. Allow unavailable products
    b. Display product prices
    c. Allow negative quantities

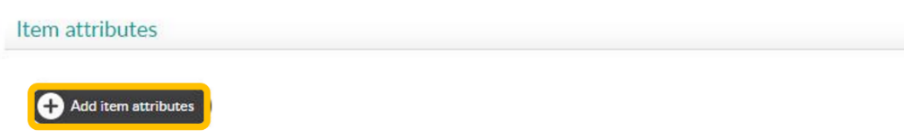


5. Enter **Document Statuses**. This field is used when a sales document has been completed by a rep, and it requires a manager's feedback for that document. For example, if a rep completed a Returns document, their manager would select one of the following options in Repsly regarding that document: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

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

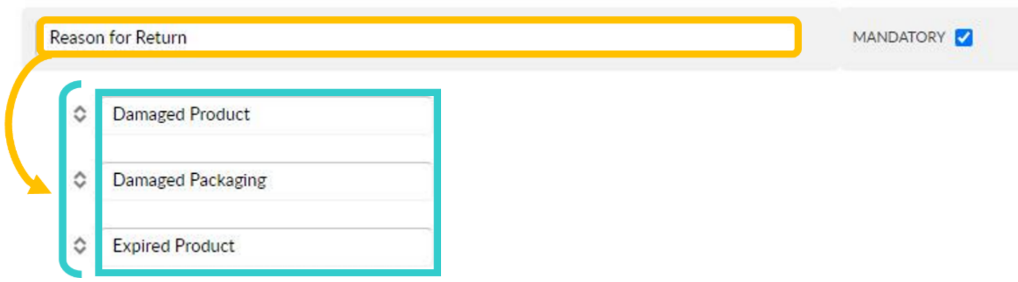


6. Set your **Item Attributes**. This field describes the status of items in your price list. For example, you are tracking product returns in Repsly, but you want to know the reason for the return.
    a. Click **+ Add item Attributes**.

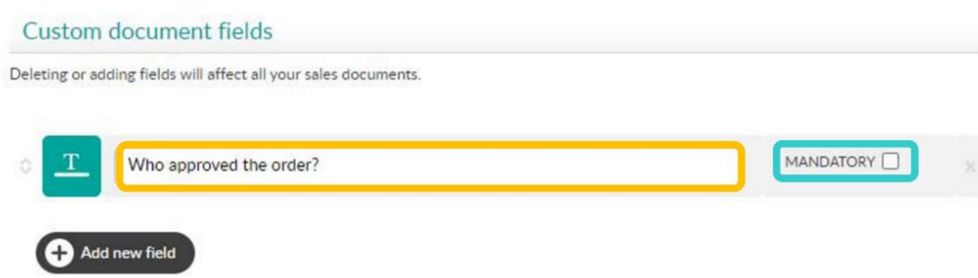


b. Enter the name of the **Attribute** > click **Mandatory** if desired.

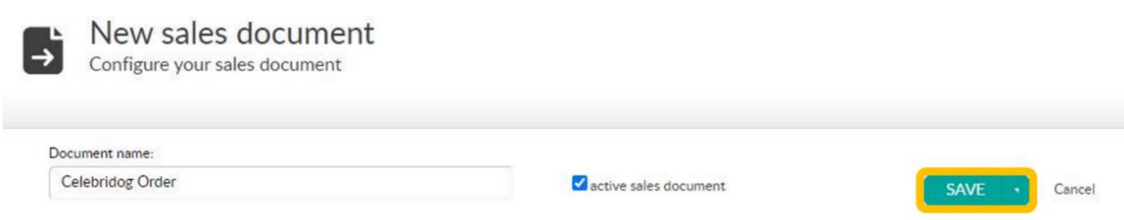
c. Enter the **associated options** to the **item attribute**.



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

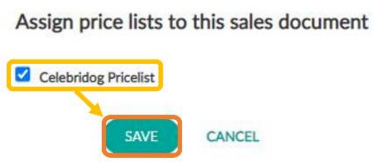


8. Click **Save**.

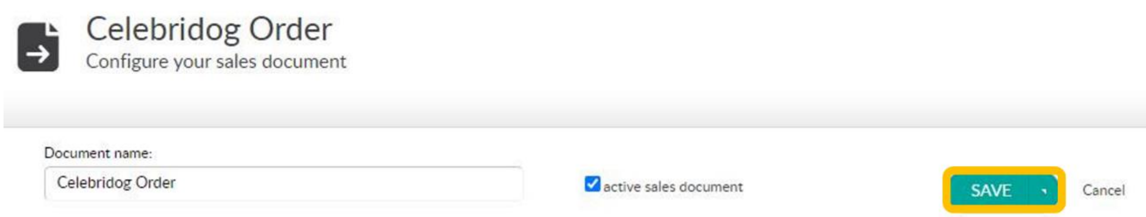


9. Click **Choose Pricelist**.

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



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.