Contents

Welcome to Repsly U!

repsly

WELCOME TO
REPSLY U!

The Power of Reporting

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June 29, 2023

What is Reporting?

What is Reporting?

Reporting allows managers to view detailed information and trends in their data. This enhanced reporting and data analysis level allows Managers to gain visibility and better understand their business needs.
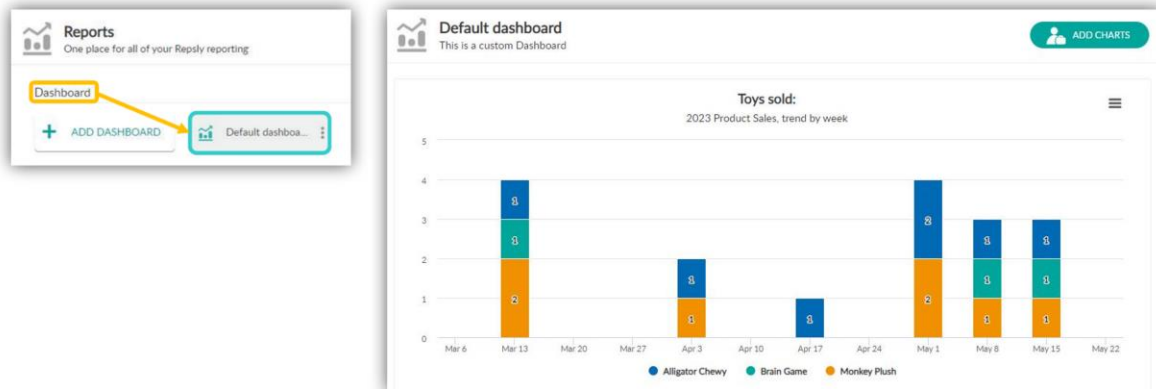
Examples of reports in Repsly are as follows:

- Dashboard Report
- Summary Report
- Rankings Report
- Sales Report
- Schedule Report
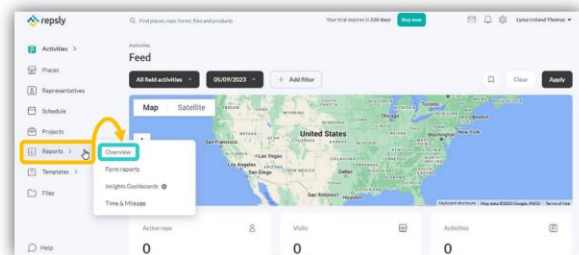
- Coverage Report
- Time & Mileage Report
- Form Report

Dashboard Report

You can customize and build your own custom dashboard by extracting the information you want based on the form you have filled out and pinning them on the dashboard.

Reporting comes with a Default Dashboard so that you can add charts from forms of interest to it.

In this example, I want to keep a constant eye on the number of products sold at my fake dog toy company, Celebridog. As you can see, the Alligator Chewy is leading the pack, so I want to make sure to get them on the shelves.

Summary Report
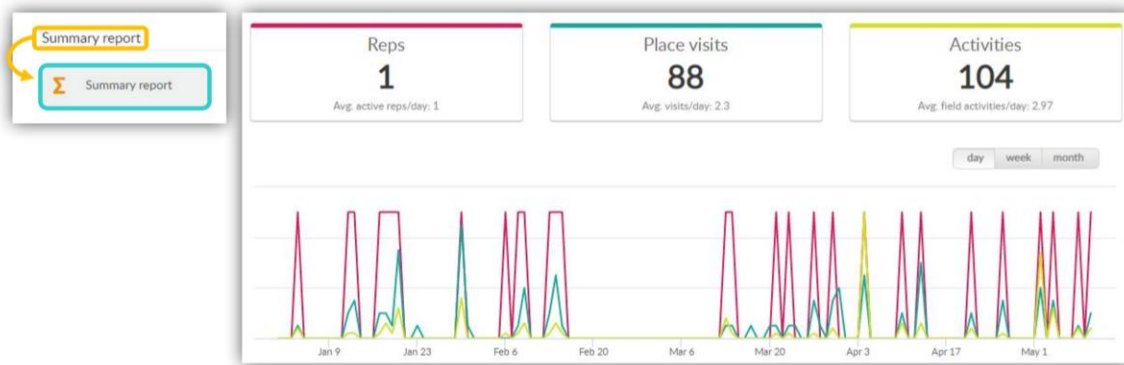
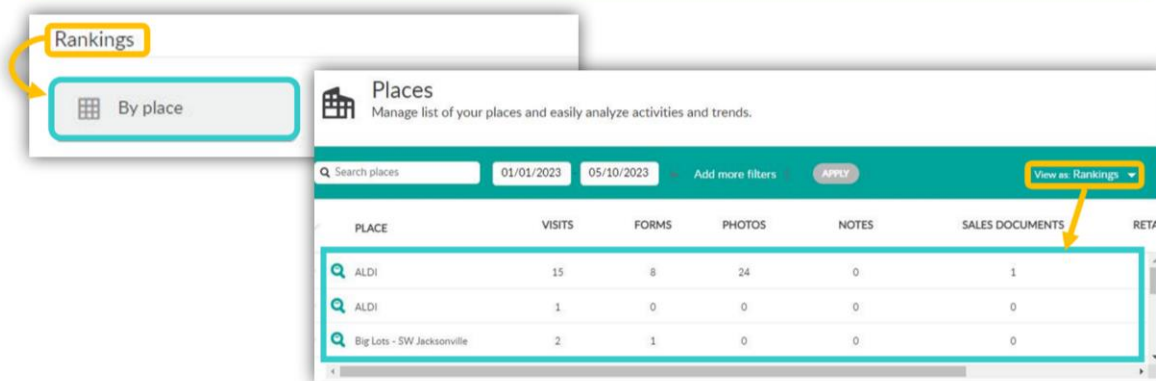Gives a high-level overview of reps' activities over a period of time.

Rankings Report

Can be seen for both place and reps. This report aims to rank your reps or places by activity.

Sales Report

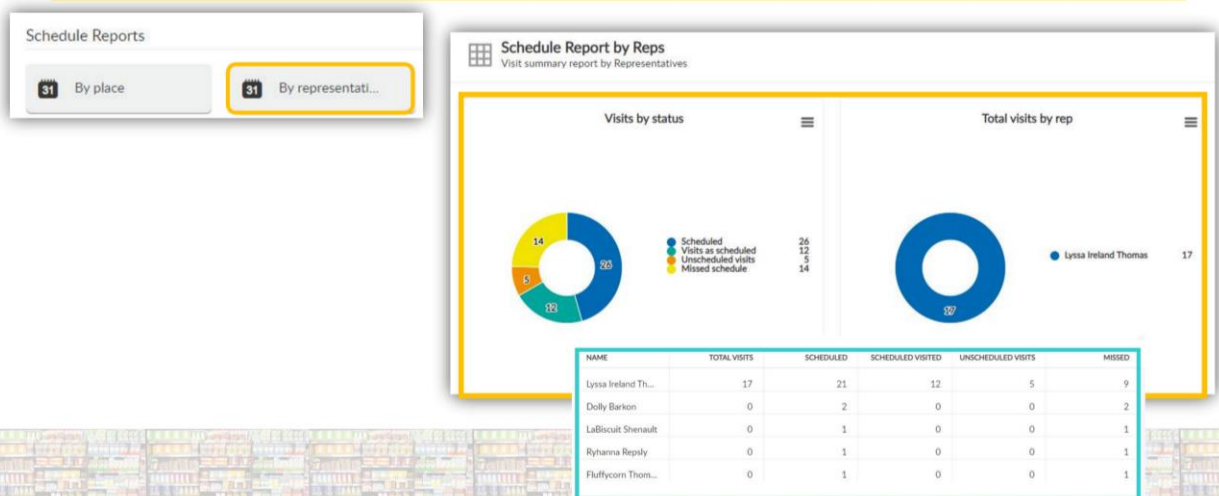# Sales Report

Reports sales by the following:

- Sales by Product
- Sales by Product Group
- Sales by Place
- Sales by Territory
- Sales by Rep

05/01/2023 - 05/15/2023   Add more filters   APPLY   EMAIL REPORT   EXPORT

Order

Sales by Product
Analyze your sales results by Products   SNAPSHOT   TREND BY

PRODUCT ID	NAME	PRICE	SALES QUANTITY	SALES TOTAL
ABCT	Angela BassetHound Chew Toy	$ 10.95	5	$ 54.75
MRCT	Mark Ruffalo Squeaky Toy	$ 10.95	4	$ 43.8
SJBST	Sarah Jessica Barker Squeaky Toy	$ 9.99	4	$ 39.96
CFDS	Colin Feral Sunglasses	$ 4.95	7	$ 34.65
NNBC	Nibbles n Bits - Chewy	$ 7.99	4	$ 31.96
NNBCR	Nibbles n Bits - Crunchy	$ 7.99	4	$ 31.96

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Schedule Report by Rep/Place

Schedule Report by Rep

Schedule Reports

By place   By representati...

Schedule Report by Reps
Visit summary report by Representatives

Visits by status

- Scheduled   26
- Visits as scheduled   12
- Unscheduled visits   5
- Missed schedule   14

Total visits by rep

- Lyssa Ireland Thomas   17

NAME	TOTAL VISITS	SCHEDULED	SCHEDULED VISITED	UNSCHEDULED VISITS	MISSED
Lyssa Ireland Th...	17	21	12	5	9
Dolly Barkon	0	2	0	0	2
LaBiscuit Shenault	0	1	0	0	1
Ryhanna Repsly	0	1	0	0	1
Fluffycorn Thom...	0	1	0	0	1

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Allows you to see **charts** by Visits by Status or Total Visits. There is also a breakdown of **Visit Types**.

Coverage Report

Coverage Report

Analyzes how well your team is covering your territory.

Total Places: total number of currently active places tracked for the company in Repsly and the number assigned to a territory or representative.

If you want to see the places not visited, click the **Places not Visited** link.
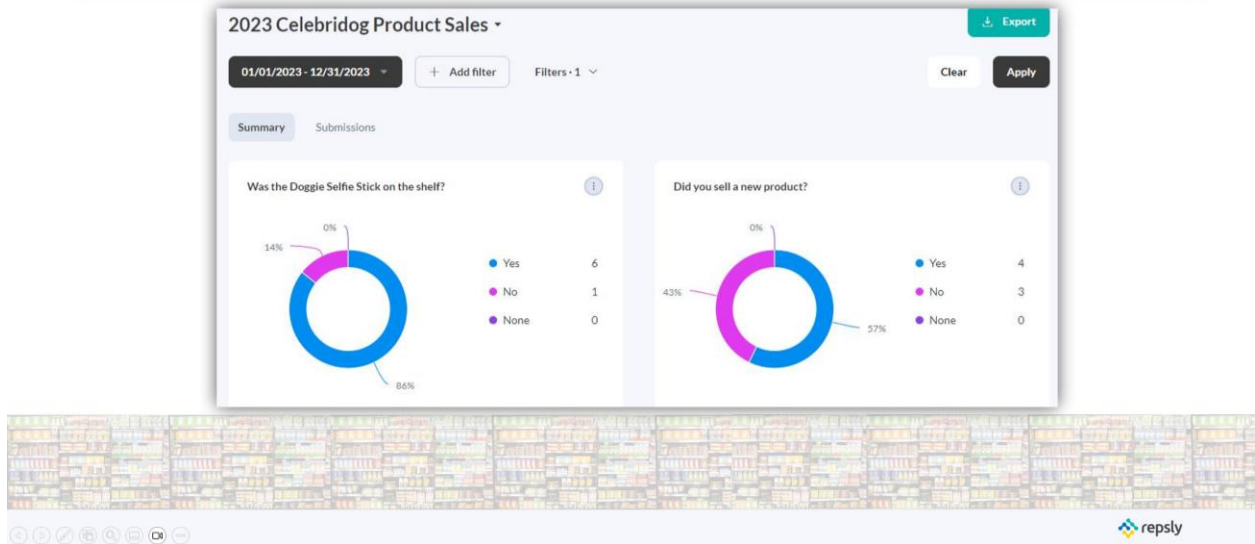
Time & Mileage Tracking

Time and Mileage Tracking

This report will show you your reps' time and mileage.

- You can update **Workday Start/End** and **Mileage Start/End**

- Click the **Map View** icon. This will allow you to view the rep's movement for that day.

Form Report

Our new Form Report makes it easy for field team managers to filter the data their team collects in the field and drill down with specific views for the accounts, products, in-store conditions, or reps that matter most.

Using Repsly Reports

Repsly provides a variety of reports for customers to view their progress. Customers also can **Add Dashboards** to view reports as they desire.

1. Click **Reports** > select **Overview**.
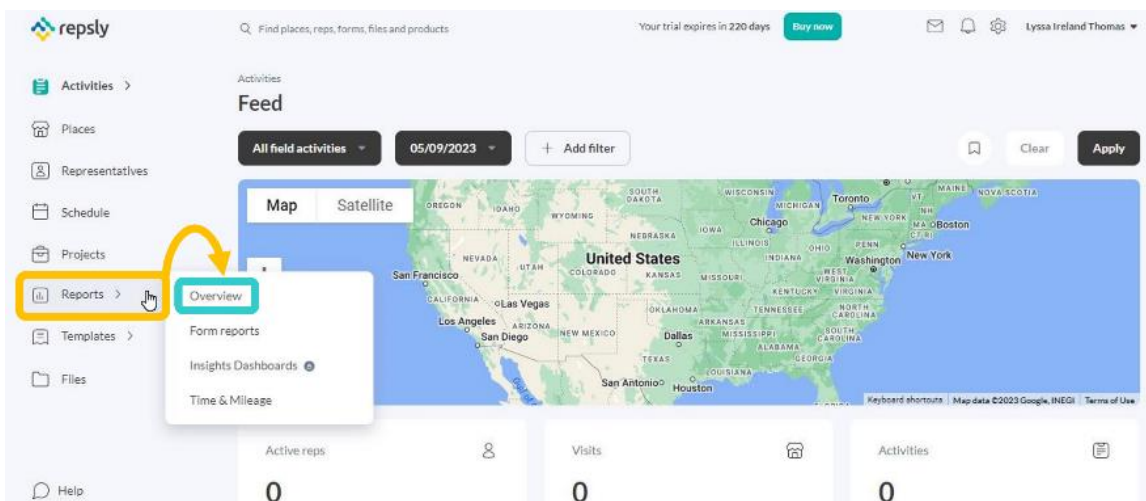
2. From the **Reports** window, you can access the following reports:

   a. **Dashboard Report**: Customize and build your dashboard. By extracting the information based on the form(s) your reps have completed, you can pin charts on the dashboard for quick viewing. Then, you can have that dashboard sent to you via email on your desired schedule.

   b. **Summary Report**: Gives a high-level overview of reps' activities over a period of time.

   c. **Rankings Report**: Rankings for both place and reps. This report aims to rank your reps or places by activity.

   d. **Sales Reports**: A sales report by Product, Product Group, Place, Territory, or Representative.

   e. **Schedule Reports**: A schedule report by place or representative.

   f. **Coverage Reports**: Analysis of how well your team covers your territories.

Understanding Repsly Buttons/Icons

Repsly uses similar buttons and icons throughout the software, so you can quickly learn how to perform tasks. The buttons and icons you will consistently see are as follows:

- **Add Charts**: select questions from your forms to create a chart.

  ADD CHARTS

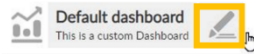- **Apply**: refreshes screen according to filter selection.

  APPLY

- **Chart Context Menu** (hamburger menu): a menu that allows you to pin the chart to the dashboard, remove the chart from the dashboard, or export the chart.

  ≡

- **Edit**: change the name of the dashboard and enter the description.

- **Email Report**: schedule and email the current screen's information.
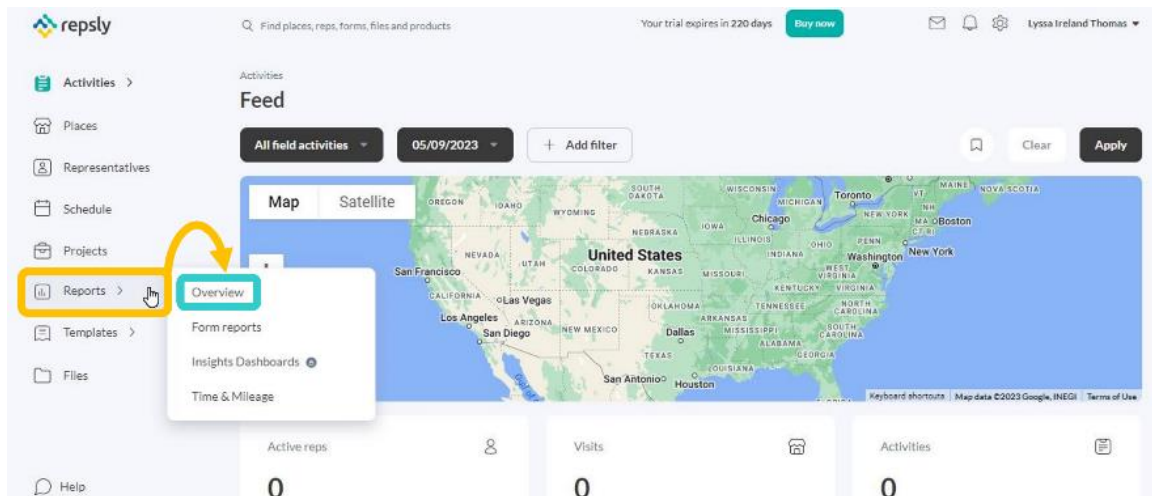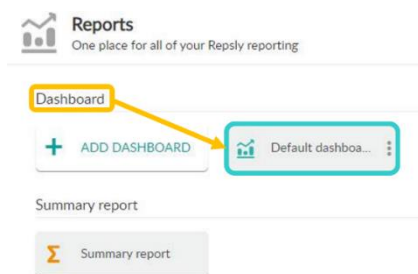

Understanding the Different Reports in Repsly

Different reports meet a variety of needs. Let's review the various reports to see what fits your needs best.
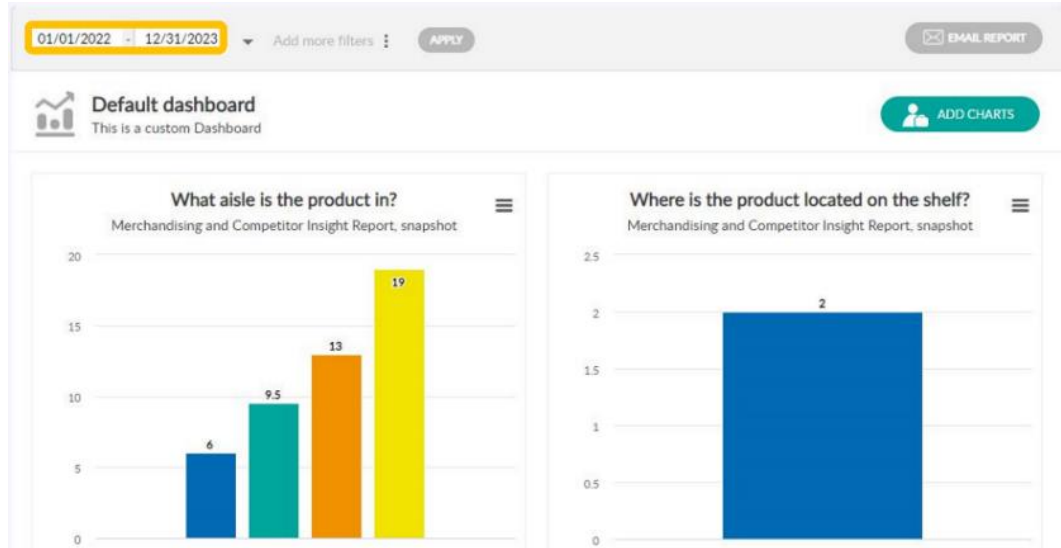
Dashboard

1. Click **Reports** > select **Overview**.
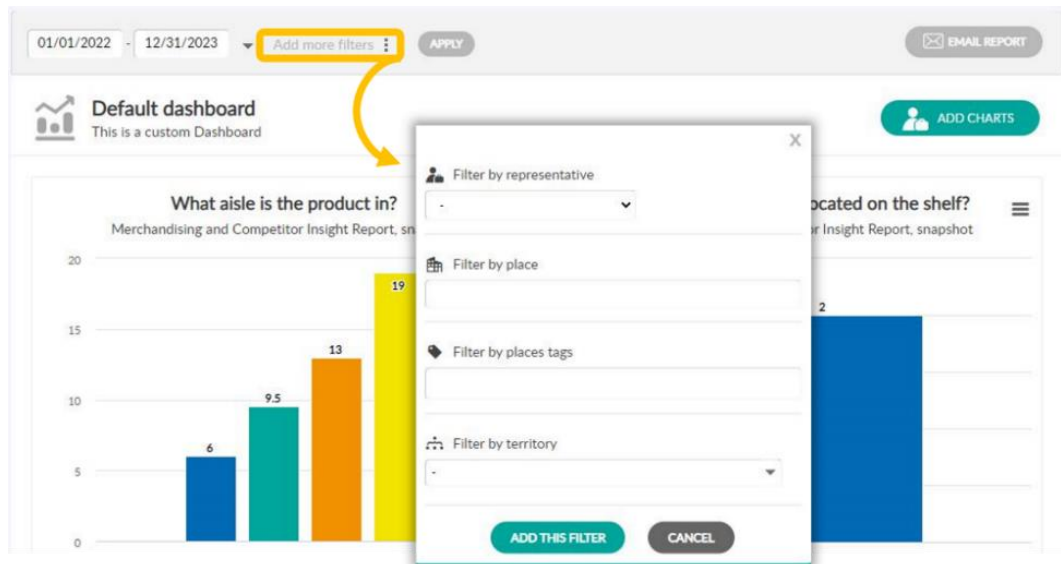

2. Under **Dashboard** > select **Default Dashboard**.

3. From this view, you can do the following:

   a. **Filter by date**

   b. **Add more filters** > click the **three dots** (kebab menu) to open.

4. Look under the chart question to see which **form** correlates with the question. This example, it's a **Snapshot** from the Merchandising and Competitor Insight Report.

5. To add more charts to the dashboard, click **Add Charts.**

a. Select the **form** that contains the question you want to build a chart.
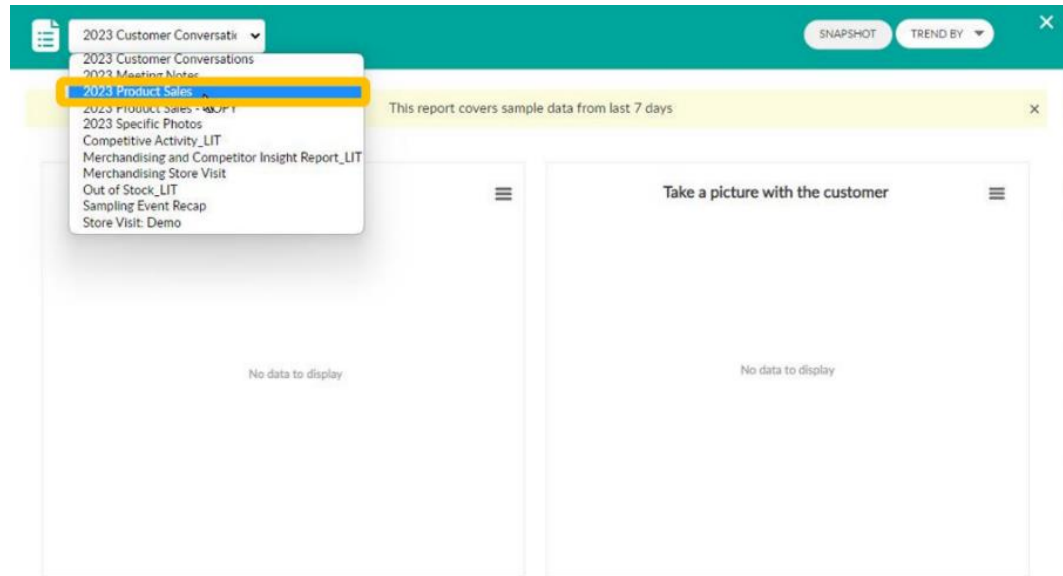
b. A **Snapshot** of the **questions** will appear.
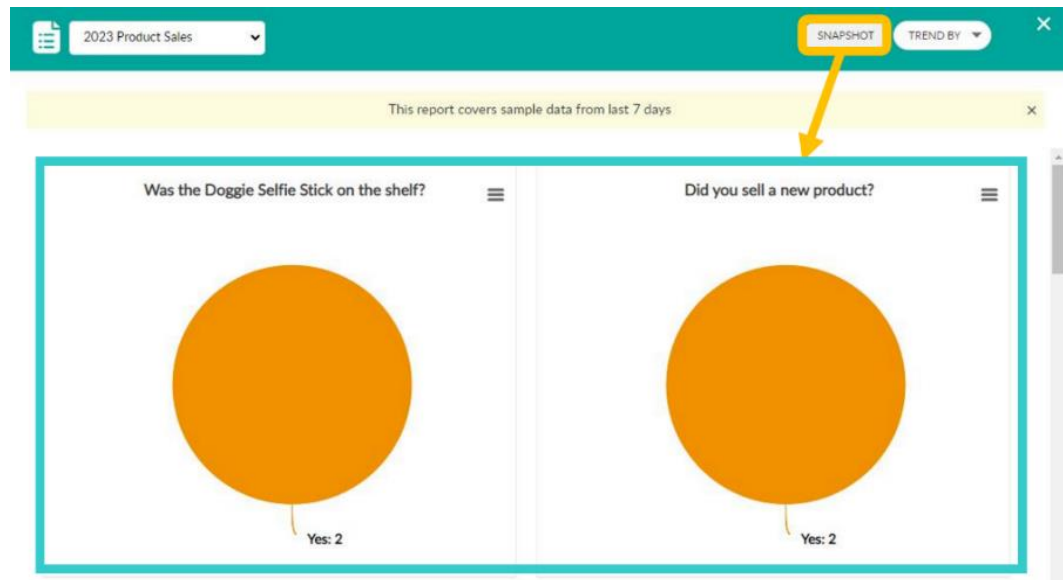
c. You can trend the charts by the following time ranges (Day, Week, or Month).
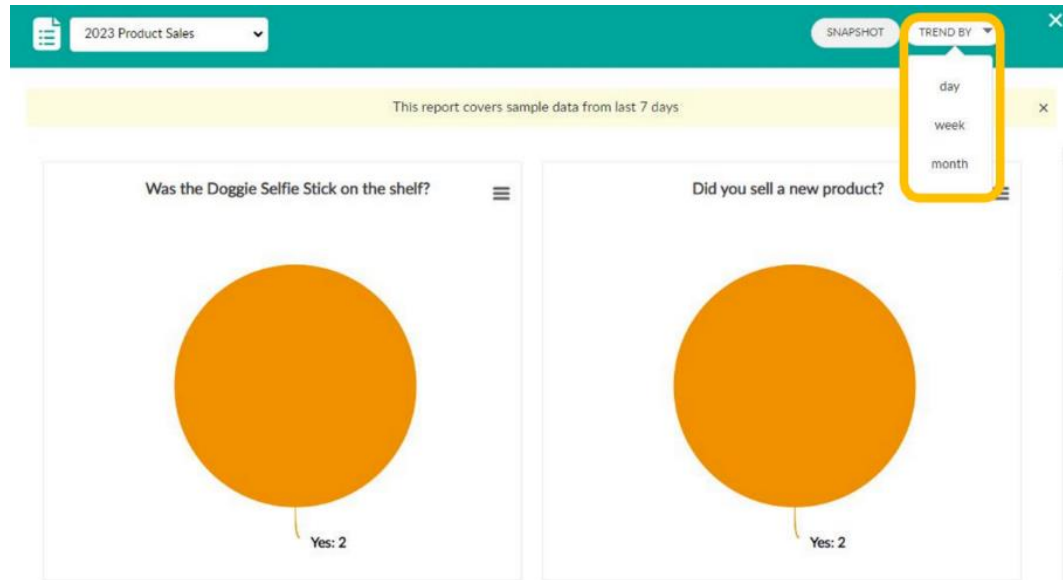
d. With the correct **form** selected, scroll down until you see the **question** you want to add to the dashboard > click the **Chart Context Menu** (hamburger menu) > and click **Pin to Dashboard**.
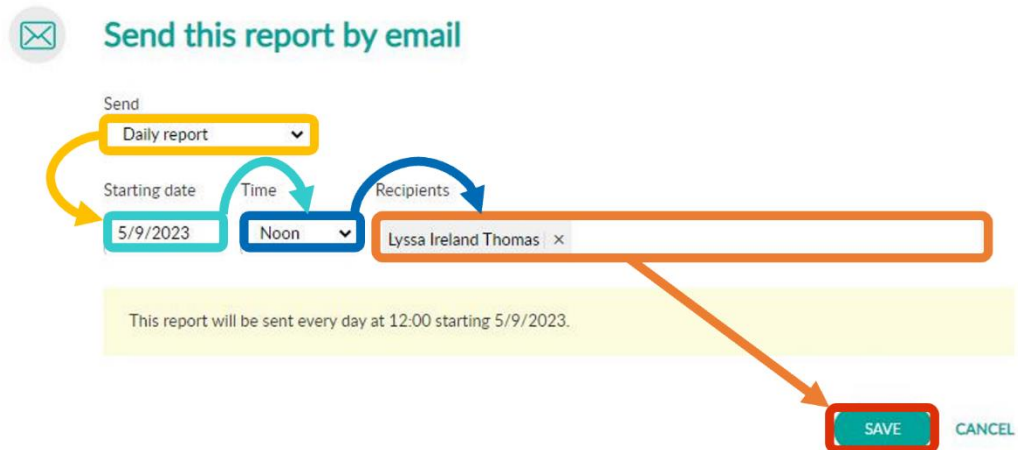
    i. **Snapshot** example:
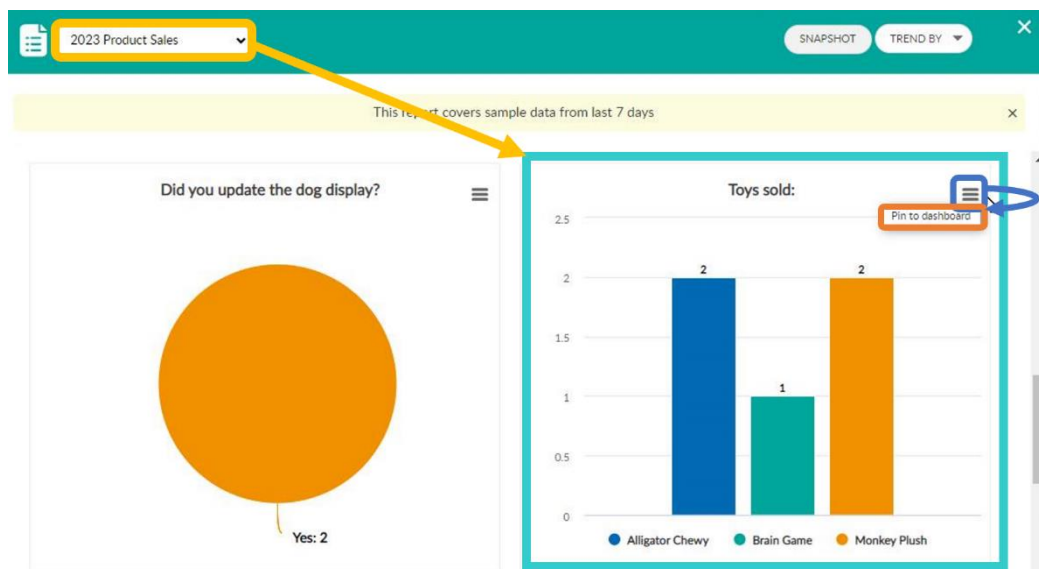
ii. **Trend by Week** example
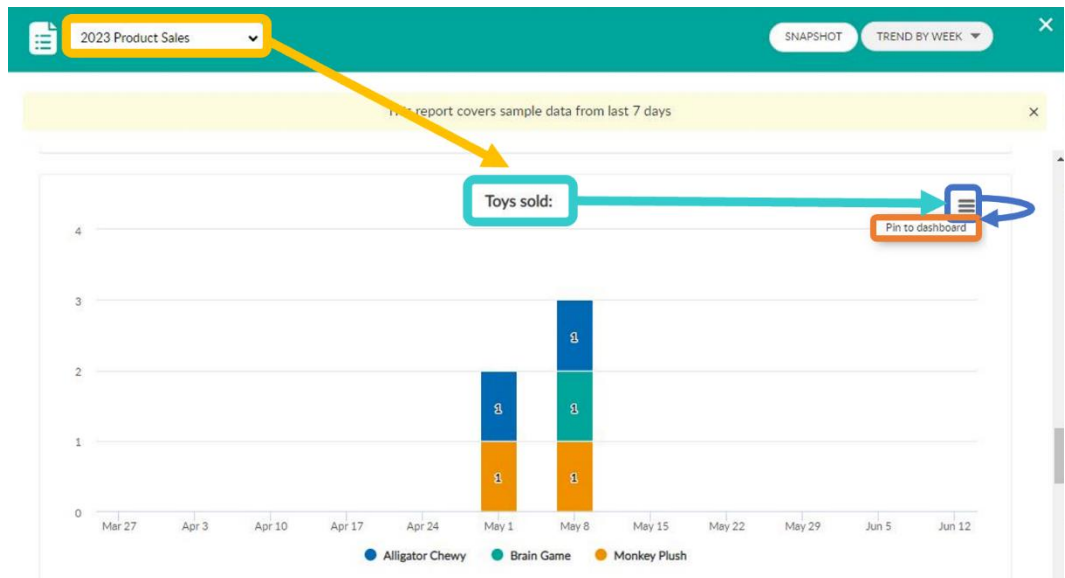
6. If you want to receive an Email Report from your Dashboards, click **Email Report**.
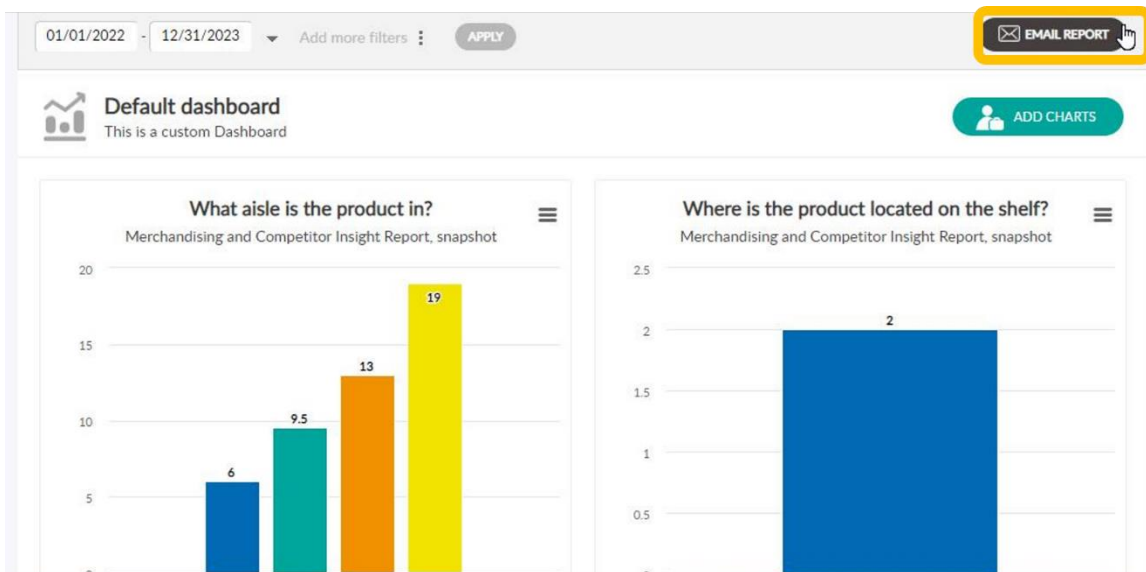
a. Complete the following information:

i. **Send Frequency**

ii. **Starting Date**

iii. **Time of Day**

iv.   **Recipient** (report can only be sent to Repsly users)
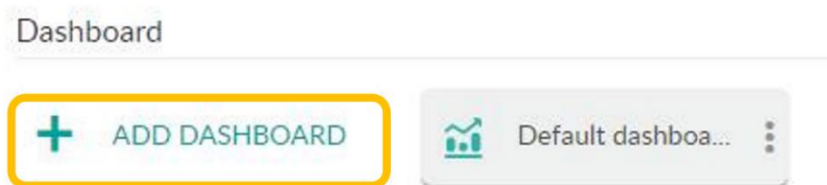
v.   Click **Save**.

Create a Custom Dashboard

1.   Click **Reports** > select **Overview**.
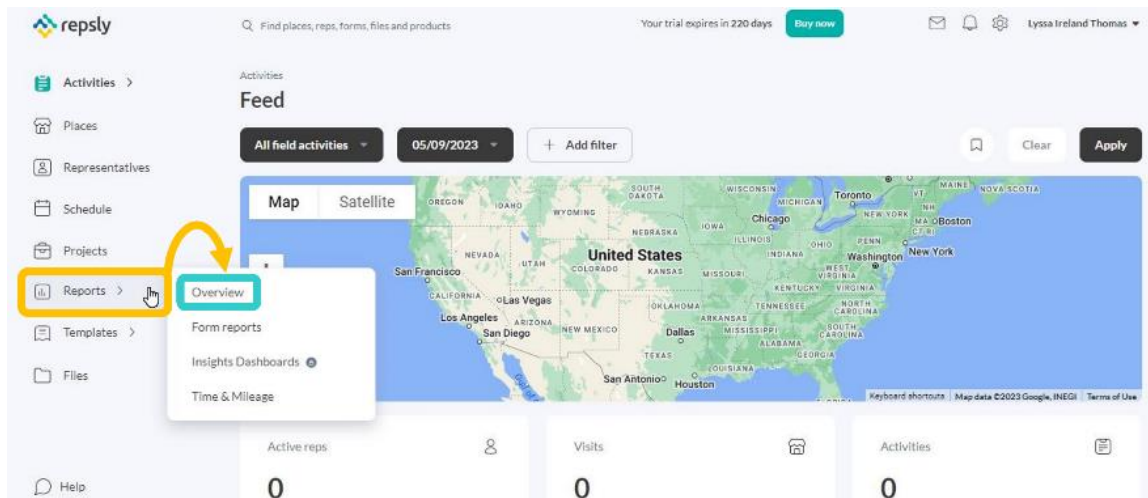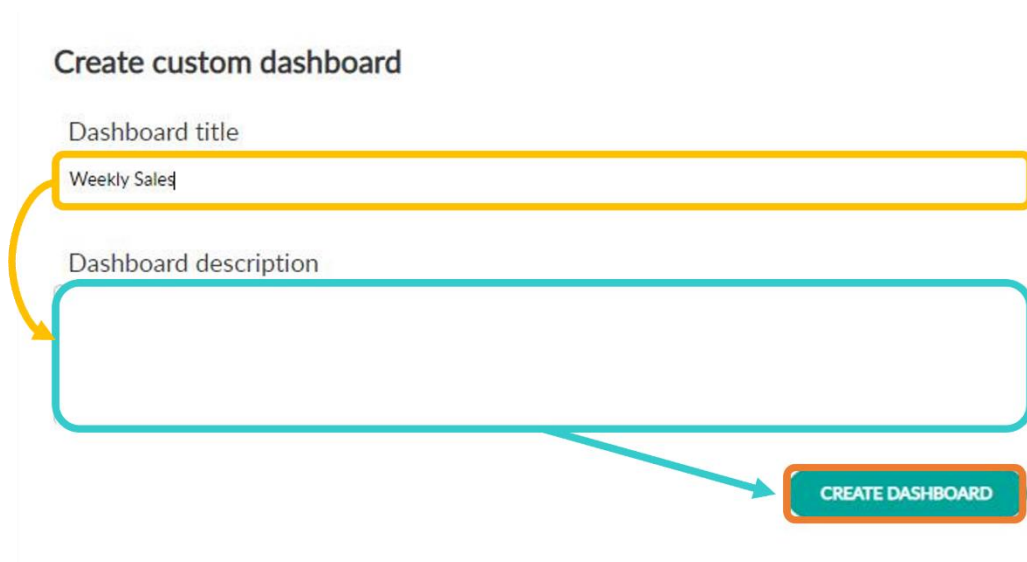

2.   Under **Dashboard** > select **+ Add Dashboard**.

7. Enter the following information and click **Create Dashboard**:

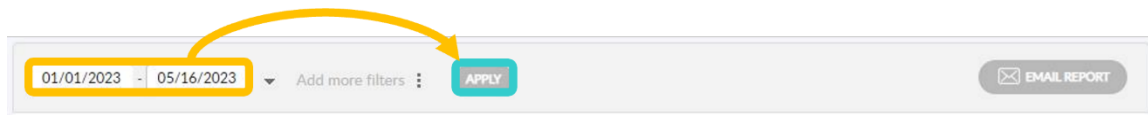   c. **Dashboard Title**

    d. **Dashboard Description**

Create custom dashboard

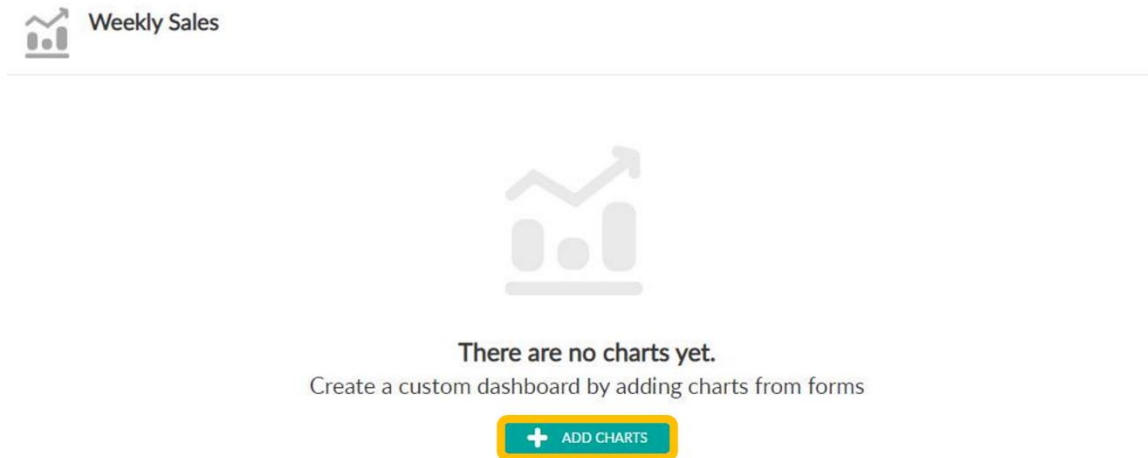Dashboard title

Weekly Sales

Dashboard description

CREATE DASHBOARD

8. Expand the **filter dates** to view data> click **Apply**.

01/01/2023 - 05/16/2023   Add more filters   APPLY   EMAIL REPORT
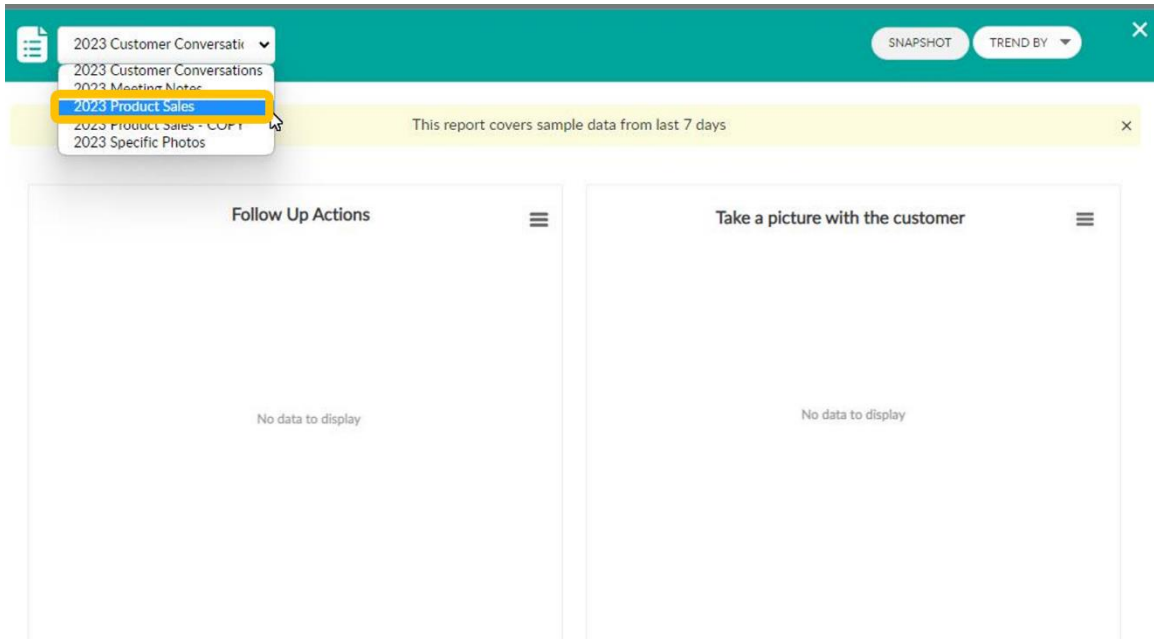
9. Click **+ Add Charts**.

Weekly Sales

There are no charts yet.
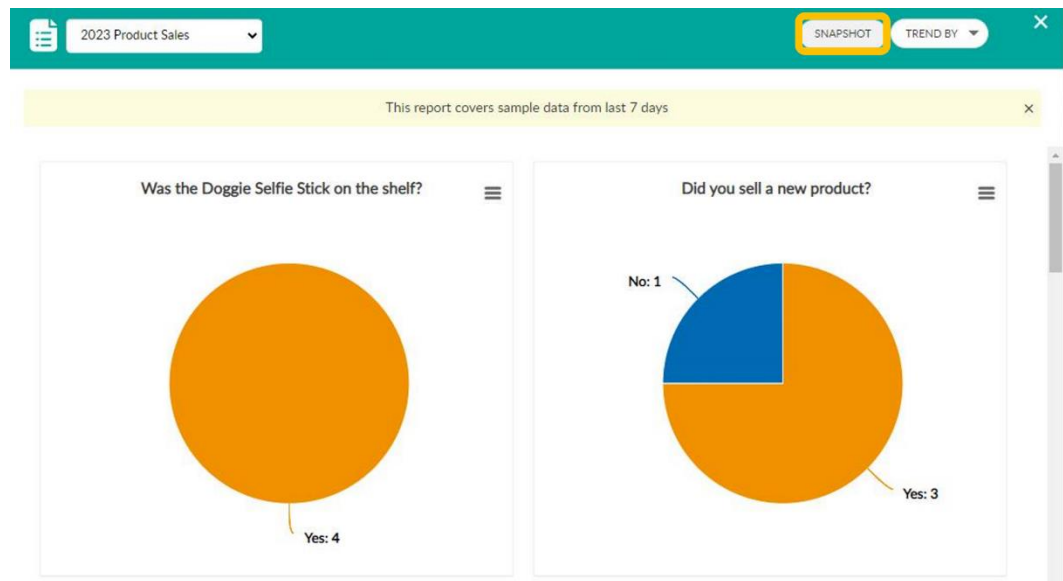Create a custom dashboard by adding charts from forms

+ ADD CHARTS

4. Select the **form** that contains the question you want to build a chart.

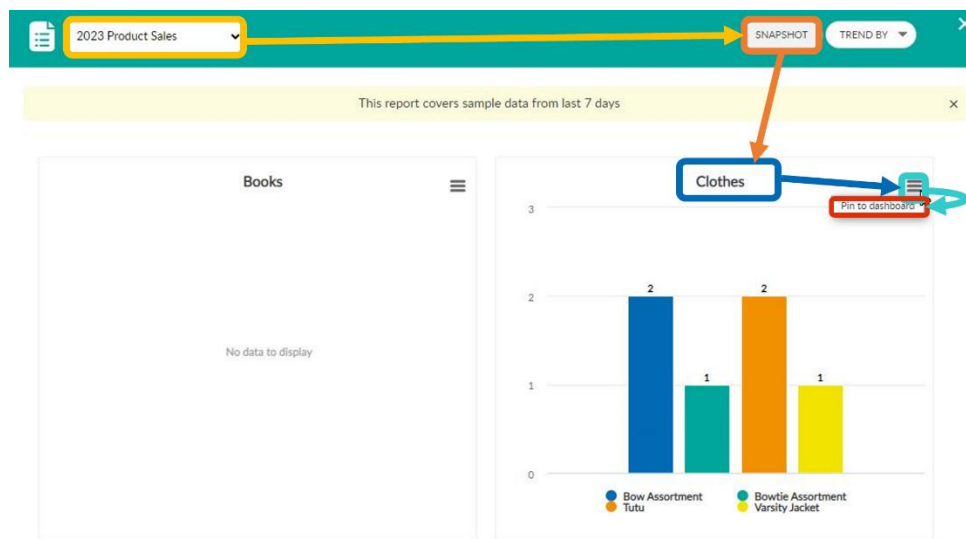a. A **Snapshot** of the form's **questions** will appear.

b. You can trend the charts by the following time ranges (Day, Week, or **Month**).

c. Select the **Form** > select either the **Snapshot** or **Trend by** view > scroll down the screen until you see the **Question** you want to add to the dashboard > click the **Chart Context Menu** (hamburger menu) > and click **Pin to Dashboard**.

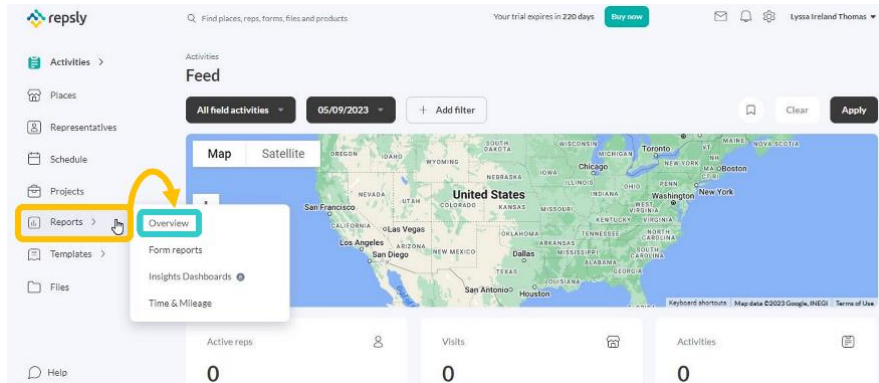   i. **Snapshot** example:

ii. **Trend by Month** example:

5. The following dashboard will result from our actions. You can set up an **Email Report** if you want this information delivered to your email on a set schedule.
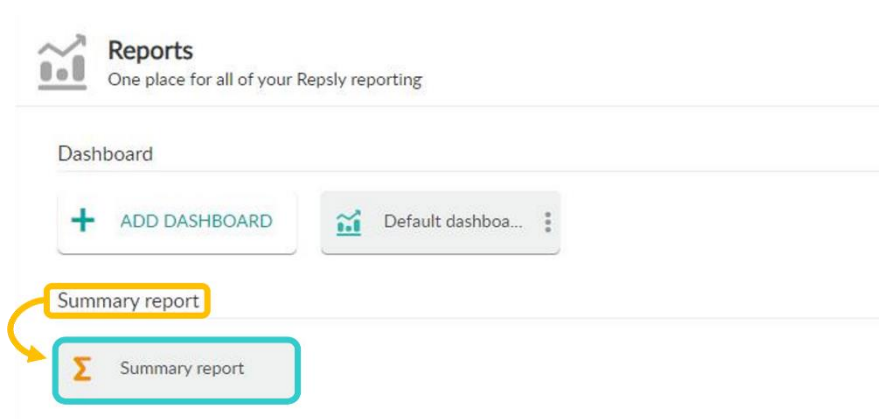
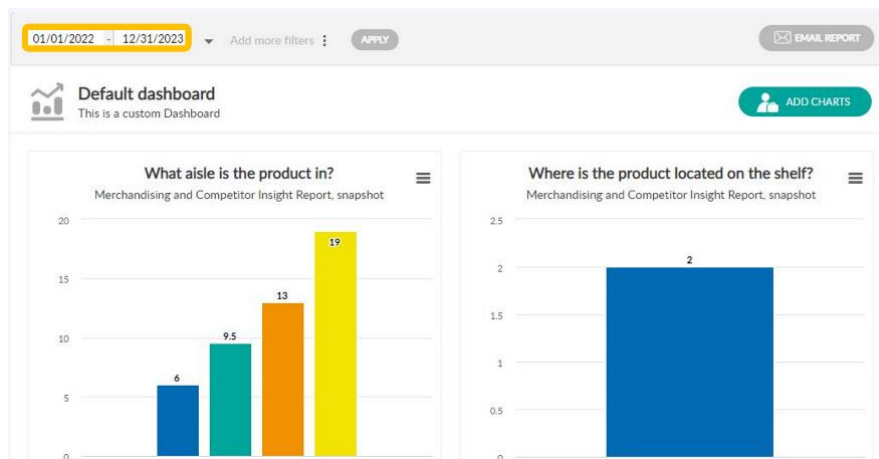## Summary Report

1. Click **Reports** > select **Overview**.

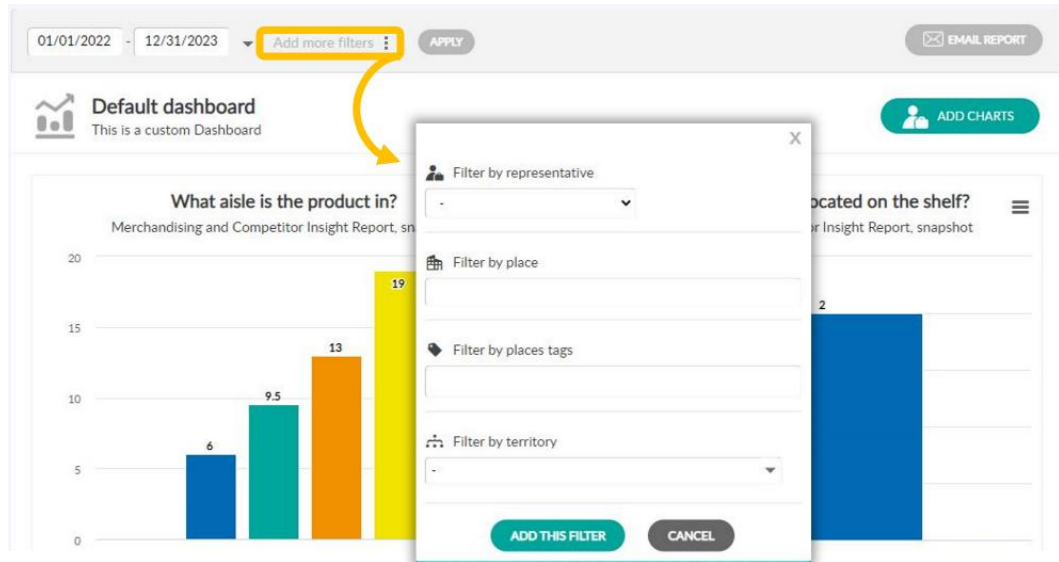2. Under **Summary Report** > select **Summary Report**.

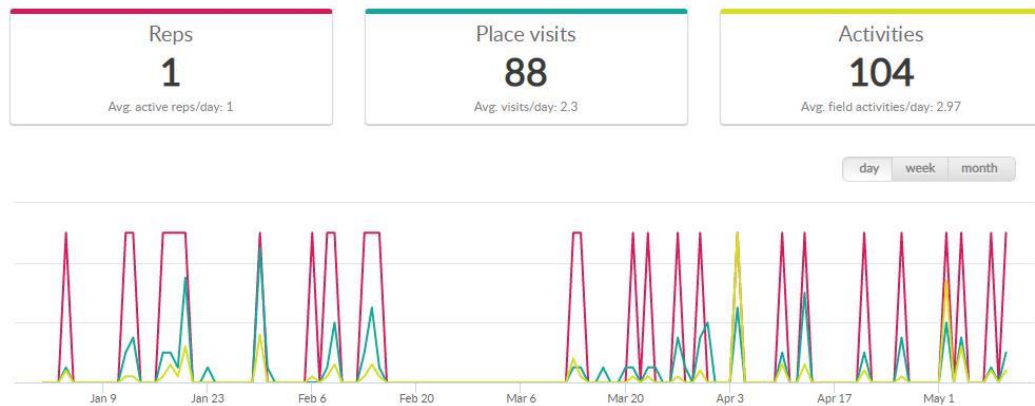3. From this view, you can do the following:

   a. **Filter by date**

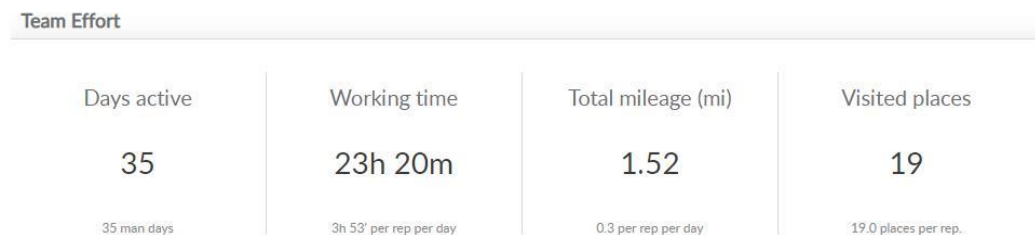b. **Add more filters** > click the **three dots** (kebab menu) to open.

4. This screen gives you summary information about your Repsly Usage. This is a great place to grab screenshots for presentations.
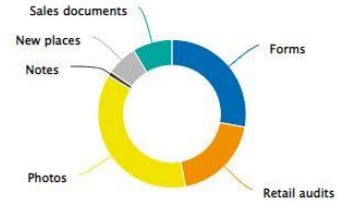
   a. Reps, Place Visits, and Activities

   b. Team Effort

c. Activities by Type

Activities by Type

📋 Forms	29	
✅ Retail audits	20	
🖼️ Photos	38	
📋 Notes	1	
🏬 New places	7	
🔽 Status changes	0	
📄 Sales documents	9	

d. Schedule Planning

Schedule planning

🚩 Total visits done	88	
🚩 Scheduled	176	
🚩 Visited as scheduled	56	
🚩 Unscheduled visits	32	
🚩 Missed schedule	119	

e. Forms

Forms

📋 2023 Customer Conversations	4	☰ Σ
📋 2023 Meeting Notes	1	☰ Σ
📋 2023 Product Sales	11	☰ Σ
📋 2023 Specific Photos	2	☰ Σ
📋 Merchandising and Competitor Insight Report_LIT	7	Σ ☰
📋 Out of Stock_LIT	1	☰ Σ
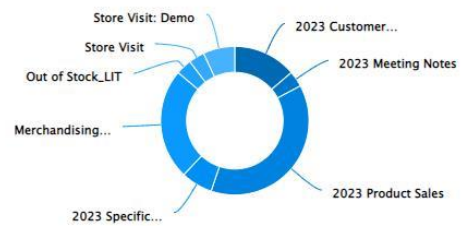
i. Plain List (Click ⊟ > you will go to the **Activities Feed**)
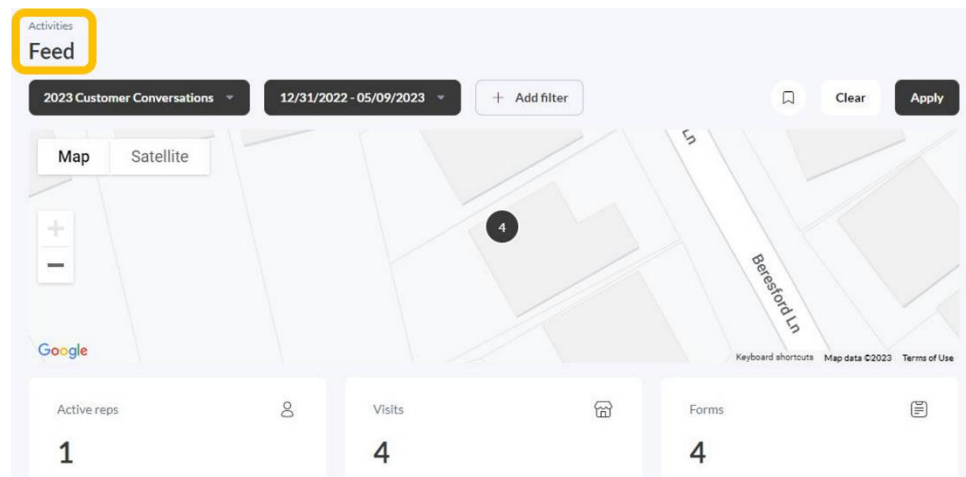
ii. Summary Report (Click Σ > you will go to the **Form Reports**)
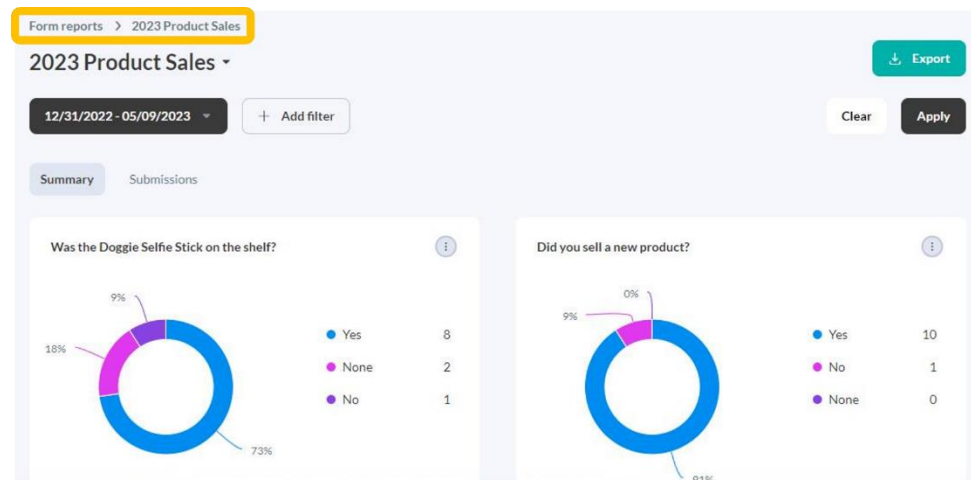
f. Retail Audits
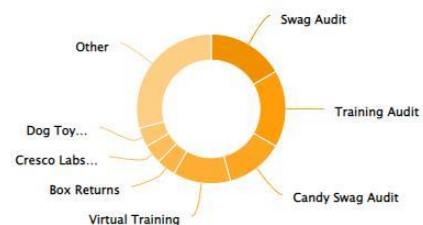
g. Sales and Merchandising

Rankings

Rankings by Place

1. Click **Reports** > select **Overview**.
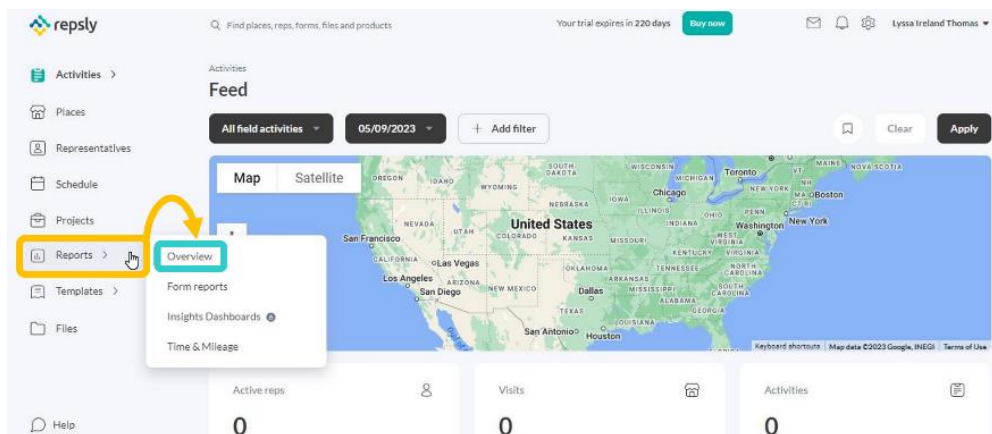
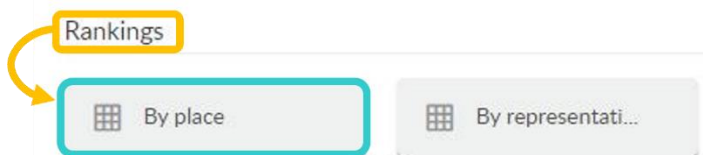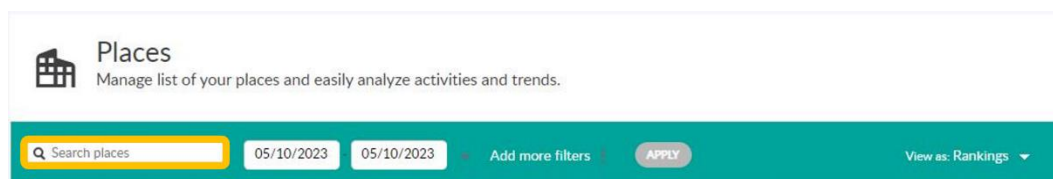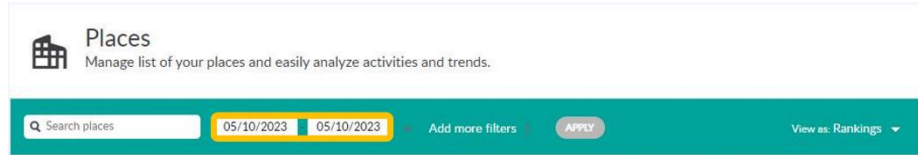2. Under **Rankings** > select **By Place**.

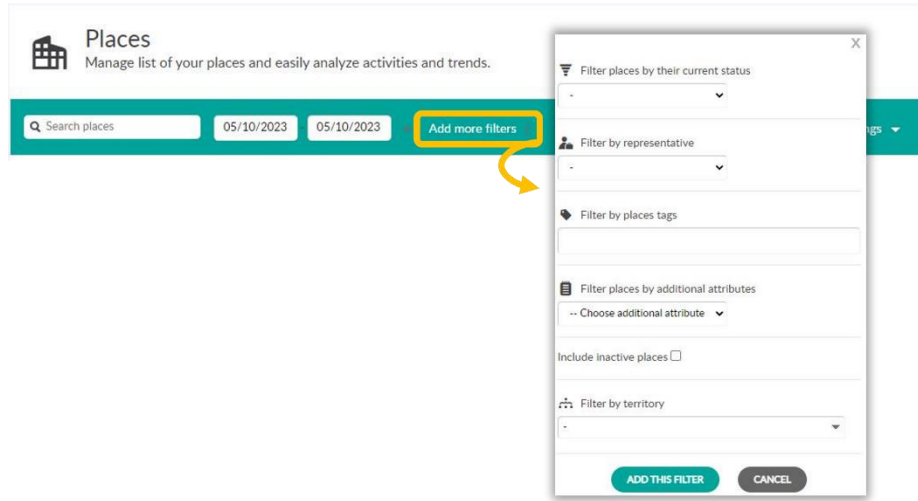3. From this view, you can do the following:
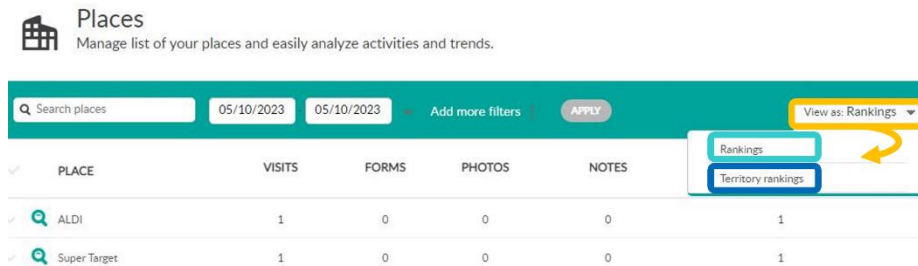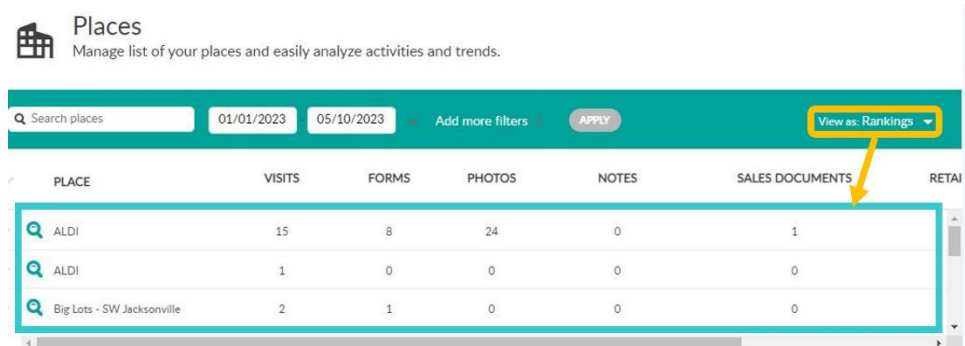
a. **Search Places**

b. **Filter by date**

c. **Add more filters** > click the **three dots** (kebab menu) to open.

d. **View as:**

i. **Rankings**

ii. Territory Rankings

4. Click Export to get the data Once you have the desired information.

5. Your **exported data** can be shared or manipulated from here.

	A	B	C	D	E	F	G	H	I
1	ID	Name	Orders	Total forms	Total visits	Total photos	Total messages	Retail audits	Total
2	2	ALDI	1	8	15	24	0	3	9.9800
3	3	Super Target	1	0	12	2	0	2	4.9800
4	12	Pet Supplies Plus	0	6	4	0	0	1	0.0000
5	4	Publix Super Market	1	1	2	0	0	0	9.9800
6	6	CVS Pharmacy	1	2	4	0	0	0	9.9800
7	7	PetSmart	0	4	8	1	0	1	0.0000
8	14	Dollar Tree	0	2	6	0	0	1	0.0000
9	15	Big Lots - SW Jacksonville	0	1	2	0	0	1	0.0000
10	25015153	Dollar General	0	0	1	0	0	1	0.0000
11	25249447	Family Dollar	0	0	1	0	0	0	0.0000
12	25285586	Wawa	0	2	4	0	0	1	0.0000
13	16	ALDI	0	0	1	0	0	0	0.0000
14	19	Lowe's Home Improvement	0	1	2	0	0	2	0.0000
15	25383393	Virtual Visits	3	1	13	1	1	5	4.5700
16	20	Repsly Corporate HQ	0	0	1	0	0	1	0.0000
17	21	My Special Store	2	1	7	9	0	1	1.5000
18	22	Dolly's Place	0	0	3	0	0	0	0.0000
19	26147260	Circle K	0	0	1	1	0	0	0.0000
20	26147275	CubeSmart Self Storage	0	0	1	0	0	0	0.0000

Rankings by Representative

1. Click **Reports** > select **Overview**.
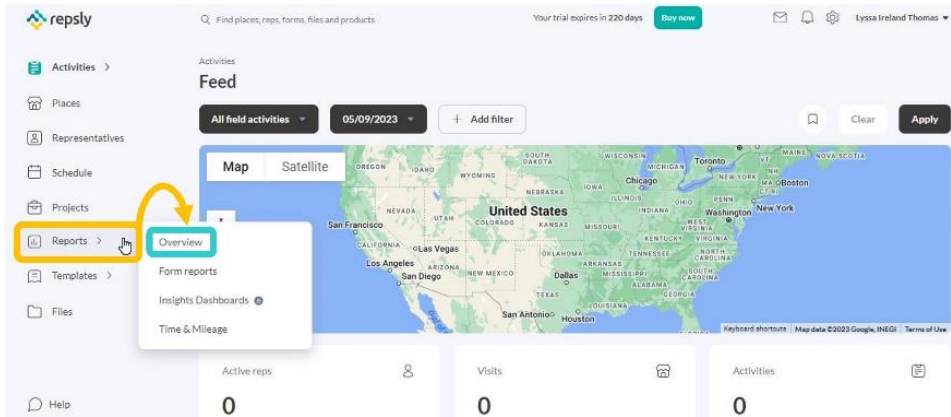
2. Under **Rankings** > select **By Representative**.

3. From this view, you can do the following:

   a. **Filter by date**

   b. **Add more filters** > click the **three dots** (kebab menu) to open.

4. Click Export to get the data Once you have the desired information.

5. Your **exported data** can be shared or manipulated from here.

Sales Reports

By Product

1. Click **Reports** > select **Overview**.

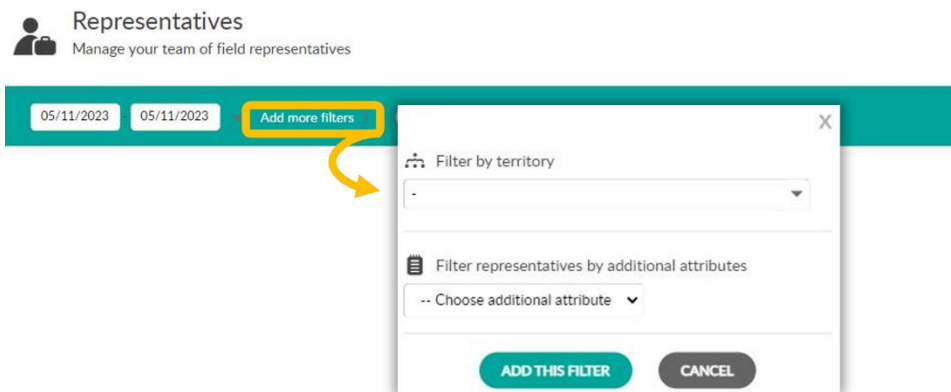2. Under **Sales Reports** > select **By Product**.

3. From this view, you can do the following:
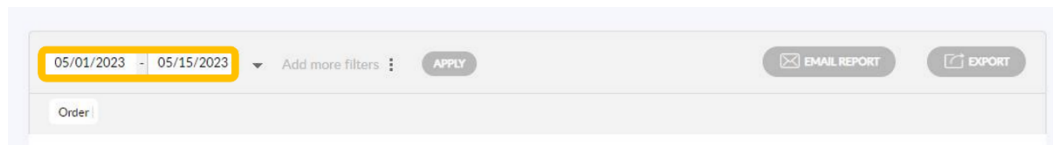
    a. **Filter by date**

    b. **Add more filters** > click the **three dots** (kebab menu) to open > select the **sales document** > click **Add This Filter**.
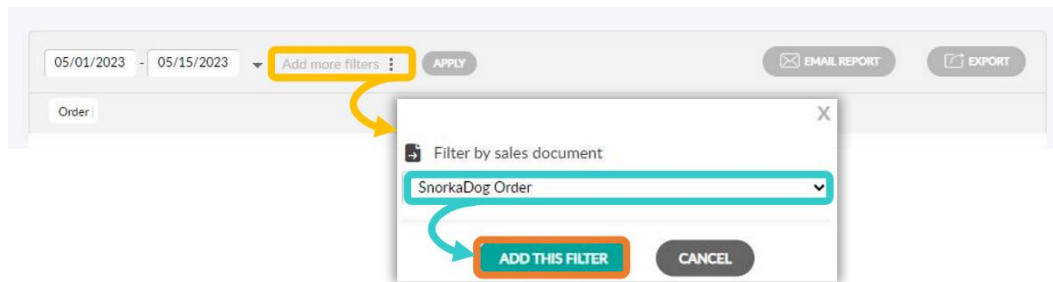
4. Click Export to get the data Once you have the desired information.
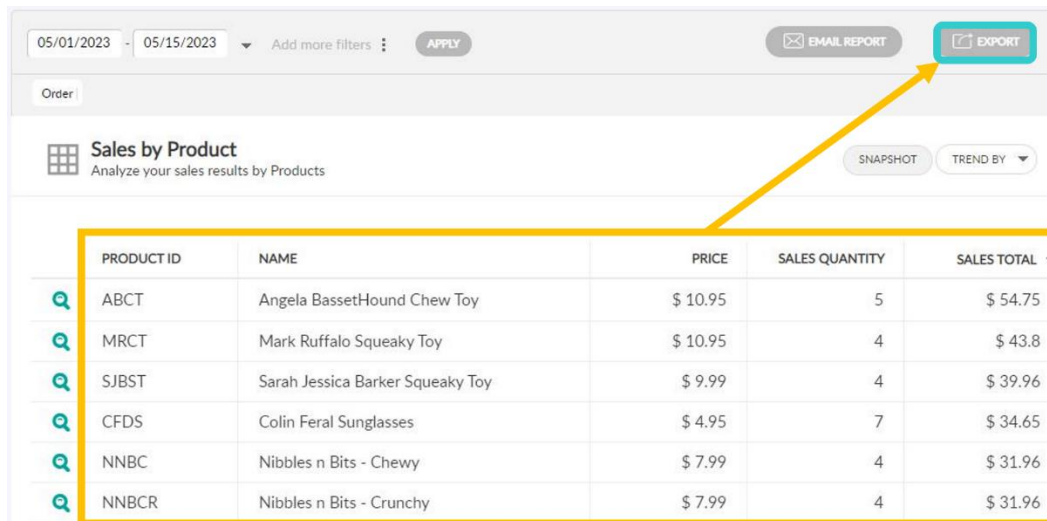
5. Your **exported data** can be shared or manipulated from here.

	A	B	C	D	E
1	ID	Name	Unit price	Quantity	Total
2	ABCT	Angela BassetHound Chew Toy	10.95	5	54.75
3	MRCT	Mark Ruffalo Squeaky Toy	10.95	4	43.8
4	SJBST	Sarah Jessica Barker Squeaky Toy	9.99	4	39.96
5	CFDS	Colin Feral Sunglasses	4.95	7	34.65
6	NNBC	Nibbles n Bits - Chewy	7.99	4	31.96
7	NNBCR	Nibbles n Bits - Crunchy	7.99	4	31.96
8	BCDP	Benedict Cumberbeagle Dog Perfume	7.95	3	23.85
9	BPCT	Millie Bobby Bone Dog Bones	4.79	4	19.16
10	BPDD	Brad Pittbull Doggie Deodorant	6.79	2	13.58
11	AACT	Ana De Alligator Chew Toy	10.95	1	10.95
12	FA101001-20	1" PH2 Impact Driver Bit 20 Bulk	9.98	1	9.98
13	CZBBones	Catherine Zeta Bones Dog Bones	4.79	2	9.58
14	MWDB	Mark Wahlbone Dog Bones	4.79	1	4.79

By Product Group

1. Click **Reports** > select **Overview**.

2. Under **Sales Reports** > select **By Product Group**.

3. From this view, you can do the following:

    a. **Filter by date**

    b. **Add more filters** > click the **three dots** (kebab menu) to open > select the **sales document** > click **Add This Filter**.

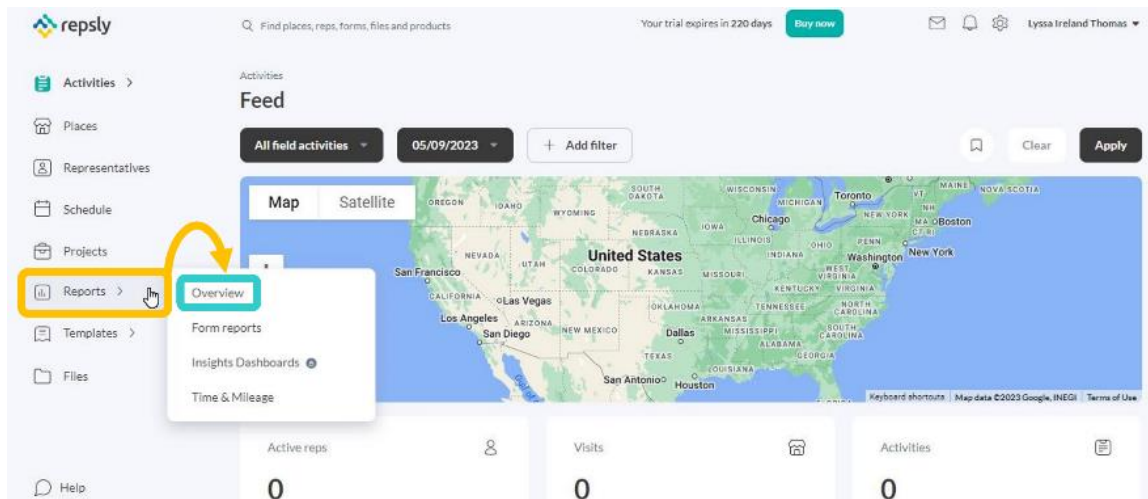4. Click Export to get the data Once you have the desired information.

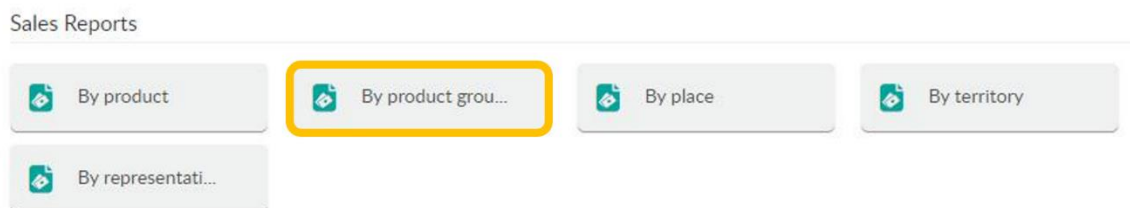5. Your **exported data** can be shared or manipulated from here.

By Place

1. Click **Reports** > select **Overview**.

2. Under **Sales Reports** > select **By Place**.

3. From this view, you can do the following:

    a. **Filter by date**

    b. **Add more filters** > click the **three dots** (kebab menu) to open > select the **sales document** > click **Add This Filter**.

4. Click Export to get the data Once you have the desired information.

5. Your **exported data** can be shared or manipulated from here.

By Territory

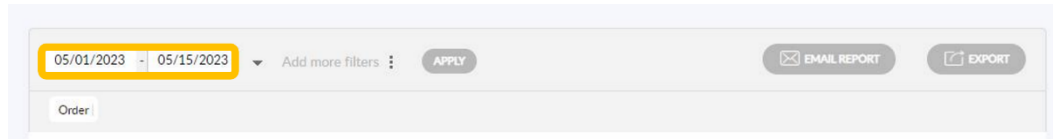1. Click **Reports** > select **Overview**.

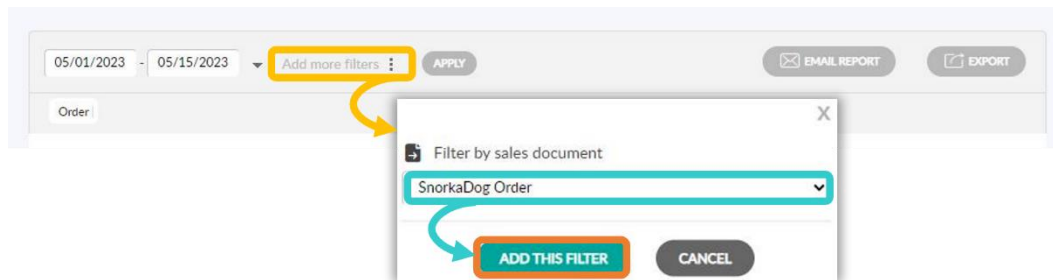2. Under **Sales Reports** > select **By Territory**.

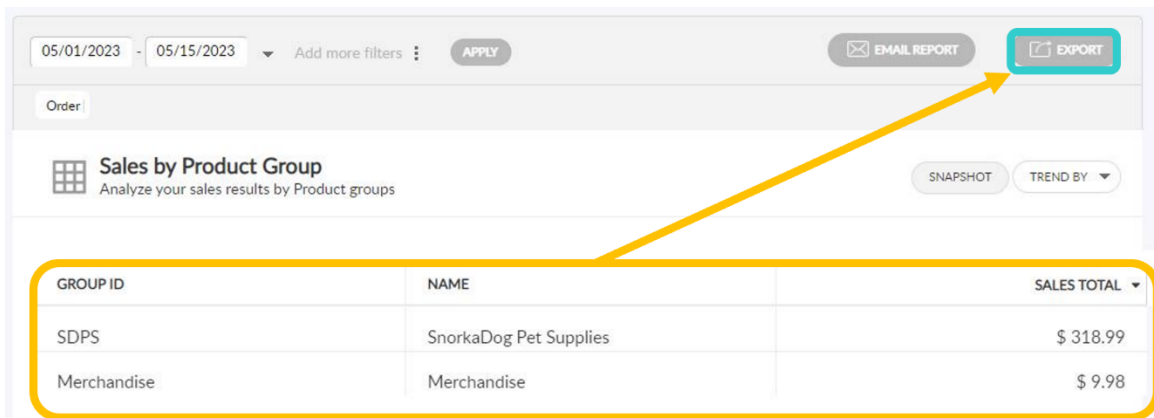3. From this view, you can do the following:

   a. **Filter by date**

   b. **Add more filters** > click the **three dots** (kebab menu) to open > select the **sales document** > click **Add This Filter**.

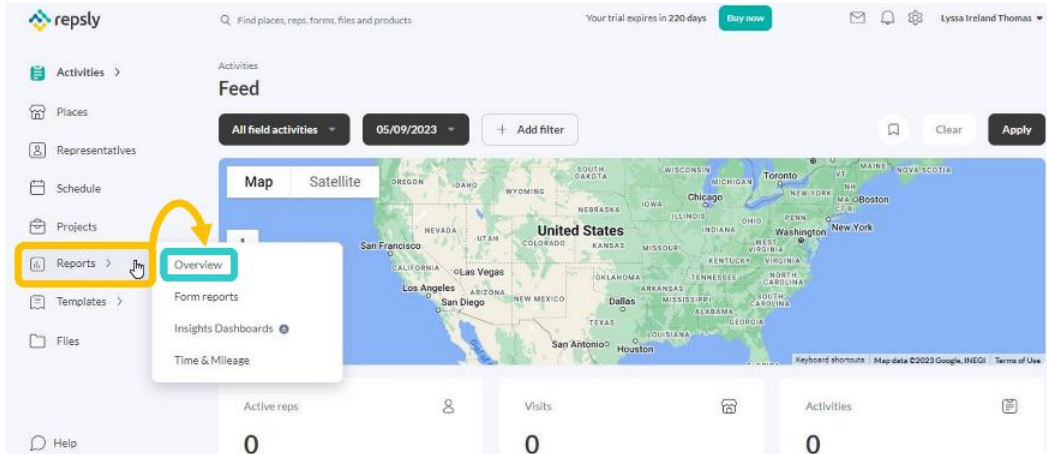4. Click Export to get the data Once you have the desired information.

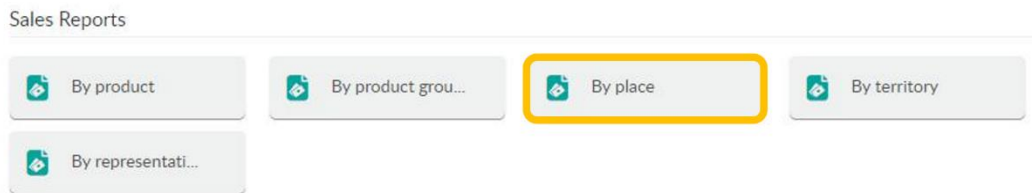5. Your **exported data** can be shared or manipulated from here.

By Representative

1. Click **Reports** > select **Overview**.
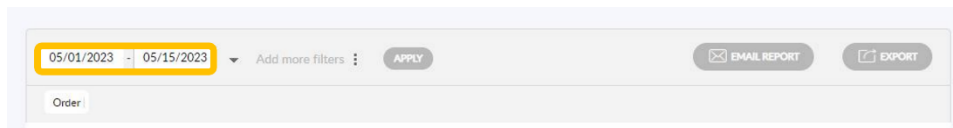

2. Under **Sales Reports** > select **By Representative**.
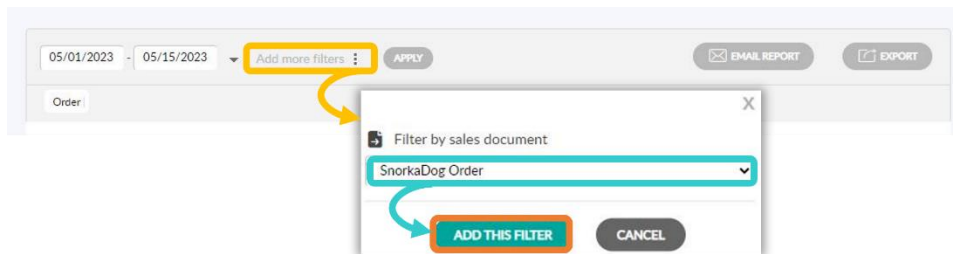

3. From this view, you can do the following:

    a. **Filter by date**

    b. **Add more filters** > click the **three dots** (kebab menu) to open > select the **sales document** > click **Add This Filter**.

4. Click Export to get the data Once you have the desired information.

5. Your **exported data** can be shared or manipulated from here.

Schedule Reports

By Representative

1. Click **Reports** > select **Overview**.

2. Under **Schedule Reports** > select **By Representative**.

⚡ repsly

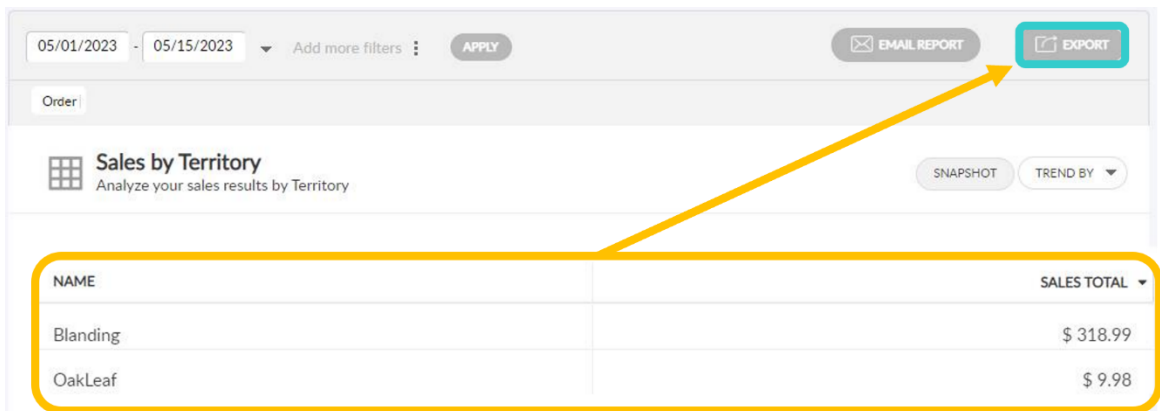3. From this view, you can do the following:

    a. **Filter by date**

    b. **Add more filters** > click the **three dots** (kebab menu) to open > select from the **filters** > click **Add This Filter**.

4. You will see **pie charts** and a **data table** based on your filter(s). Click **Export** to get the data.

NAME	TOTAL VISITS	SCHEDULED	SCHEDULED VISITED	UNSCHEDULED VISITS	MISSED
Lyssa Ireland Th...	17	21	12	5	9
Dolly Barkon	0	2	0	0	2
LaBiscuit Shenault	0	1	0	0	1
Ryhanna Repsly	0	1	0	0	1
Fluffycorn Thom...	0	1	0	0	1

5. Your **exported data** can be shared or manipulated from here.

	A	B	C	D	E	F
1	Name	Total visits done	Scheduled	Visits as scheduled	Unplanned visits	Missed schedule
2	Lyssa Ireland Thomas	17	21	12	5	9
3	Dolly Barkon	0	2	0	0	2
4	LaBiscuit Shenault	0	1	0	0	1
5	Ryhanna Repsly	0	1	0	0	1
6	Fluffycorn Thomas	0	1	0	0	1

By Place

1. Click **Reports** > select **Overview**.
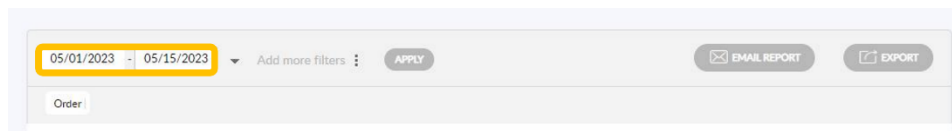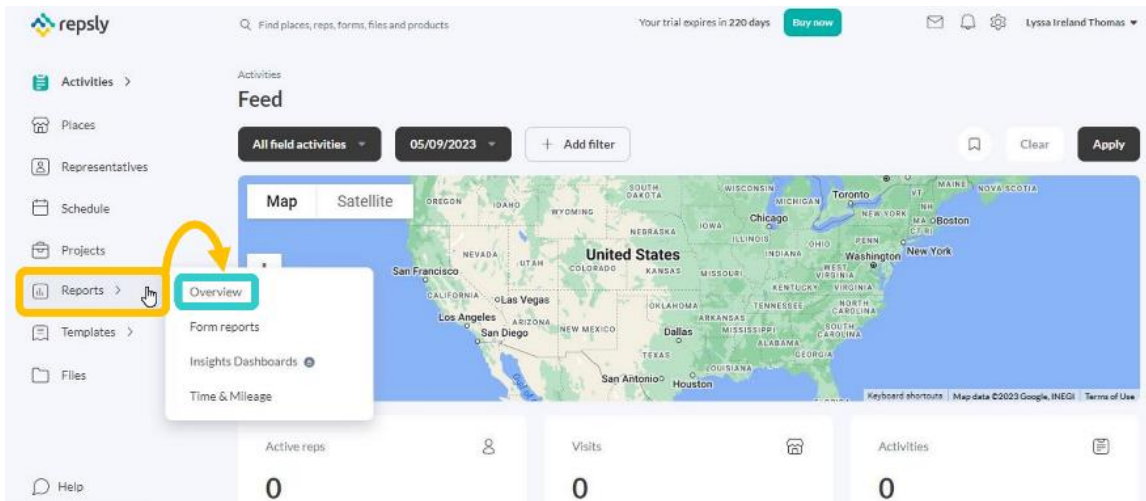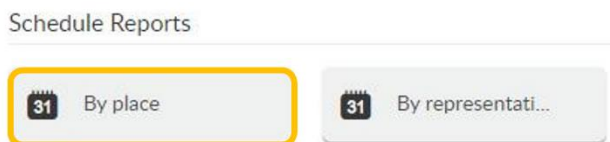

2. Under **Schedule Reports** > select **By Place**.
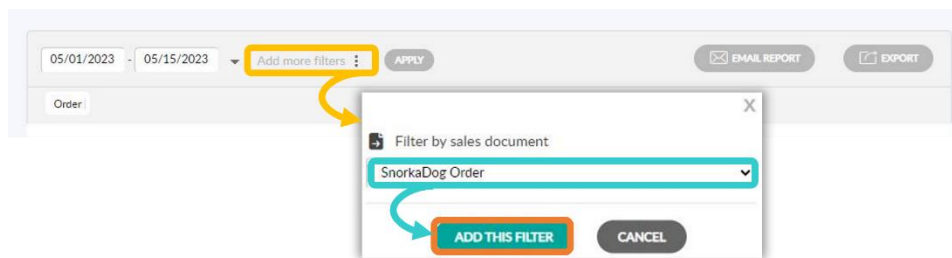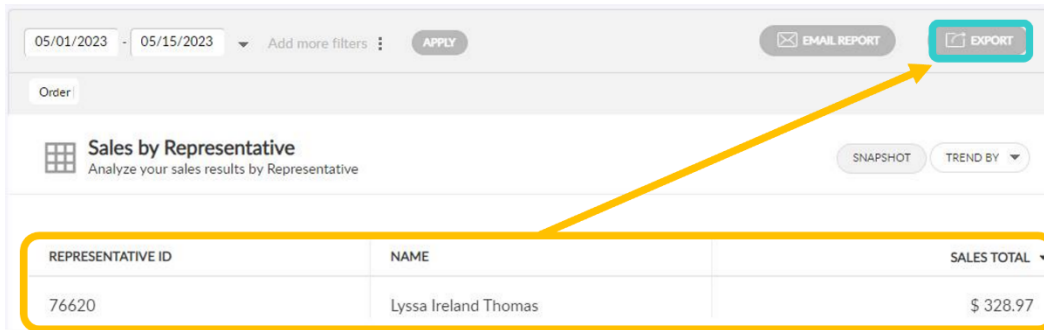
3. From this view, you can do the following:

   a. **Filter by date**
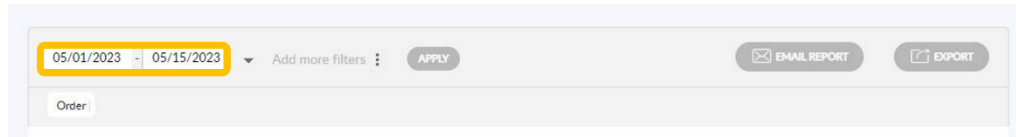
   b. **Add more filters** > click the **three dots** (kebab menu) to open > select from the **filters** > click **Add This Filter**.
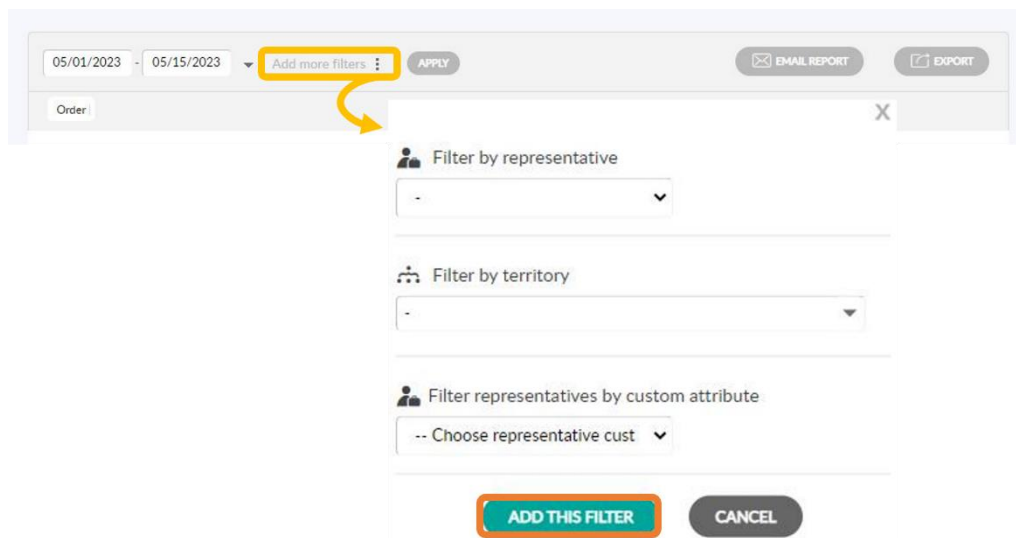
4. You will see **pie charts** and a **data table** based on your filter(s). Click **Export** to get the data.
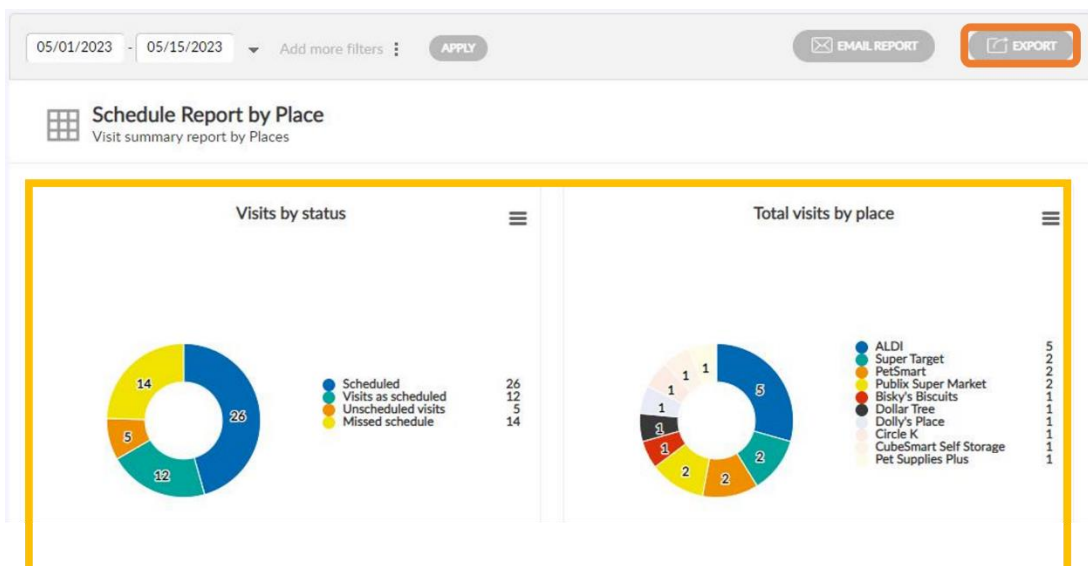
NAME	TOTAL VISITS	SCHEDULED	SCHEDULED VISITED	UNSCHEDULED VISITS	MISSED
ALDI	5	7	5	0	2
Super Target	2	6	2	0	4
PetSmart	2	3	2	0	1
ALDI	0	2	0	0	2
Bisky's Biscuits	1	1	0	1	1

5. Your **exported data** can be shared or manipulated from here.

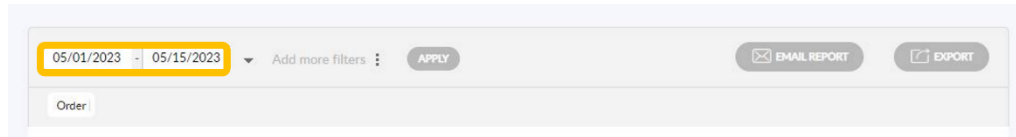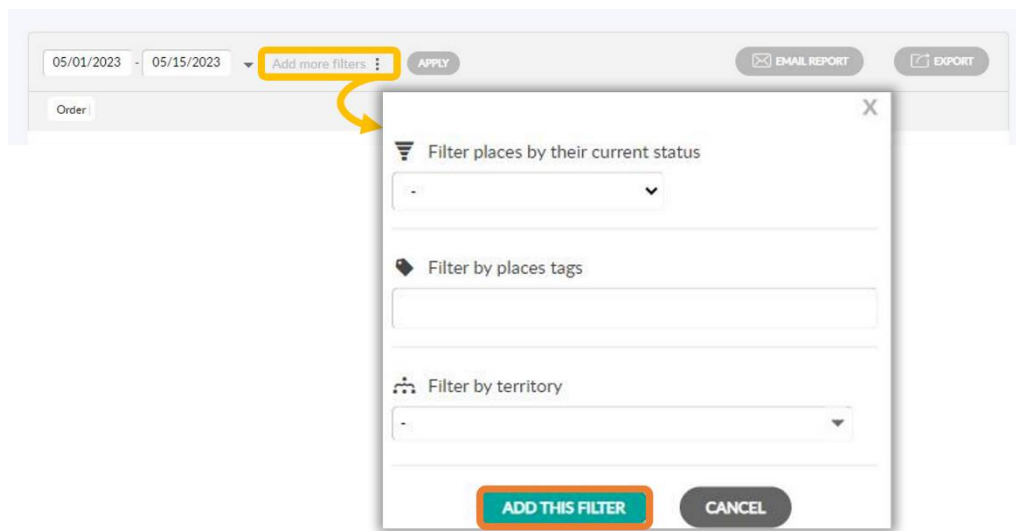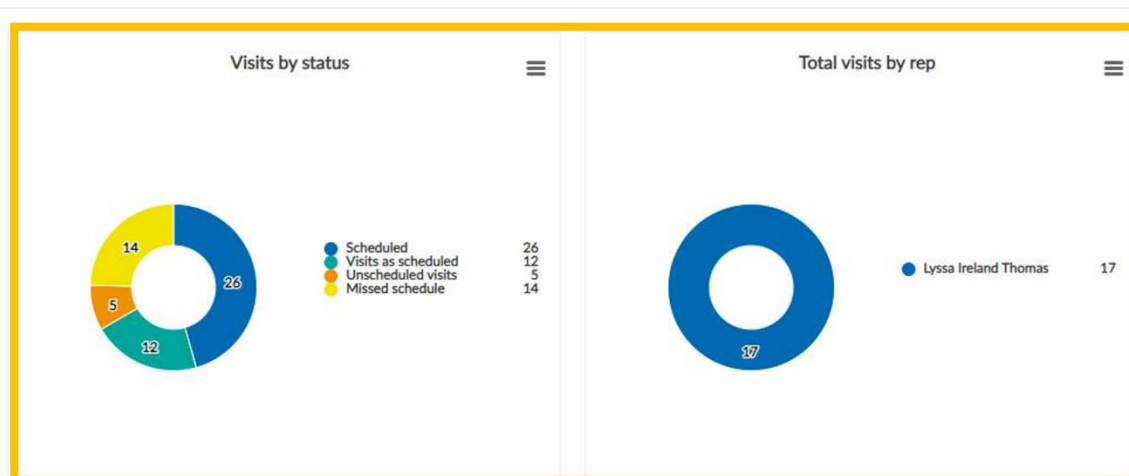|	A	B	C	D	E	F	G
1	ID	Name	Total visits done	Scheduled	Visits as scheduled	Unplanned visits	Missed schedule
2	2	ALDI	5	7	5	0	2
3	3	Super Target	2	6	2	0	4
4	7	PetSmart	2	3	2	0	1
5	16	ALDI	0	2	0	0	2
6	26147203	Bisky's Biscuits	1	1	0	1	1
7	14	Dollar Tree	1	2	1	0	1
8	22	Dolly's Place	1	0	0	1	0
9	26147260	Circle K	1	0	0	1	0
10	26147275	CubeSmart Self Storage	1	0	0	1	0
11	25530871	Costco Wholesale	0	1	0	0	1
12	12	Pet Supplies Plus	1	1	1	0	0
13	9	Publix Super Market	1	0	0	1	0
14	4	Publix Super Market	1	1	1	0	0
15	15	Big Lots - SW Jacksonville	0	1	0	0	1
16	25285586	Wawa	0	1	0	0	1

Coverage Report

1. Click **Reports** > select **Overview**.
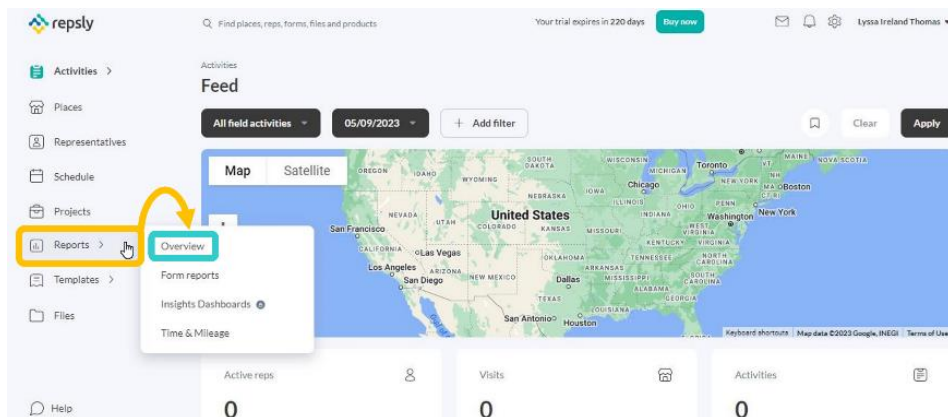
2. Under **Coverage Report** > select **Coverage Report**.
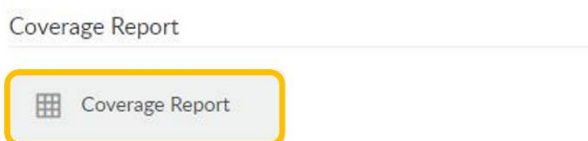
Coverage Report

3. From this view, you can do the following:

    a. Filter by date

    b. Add more filters > click the **three dots** (kebab menu) to open > select from the **filters** > click **Add This Filter**.
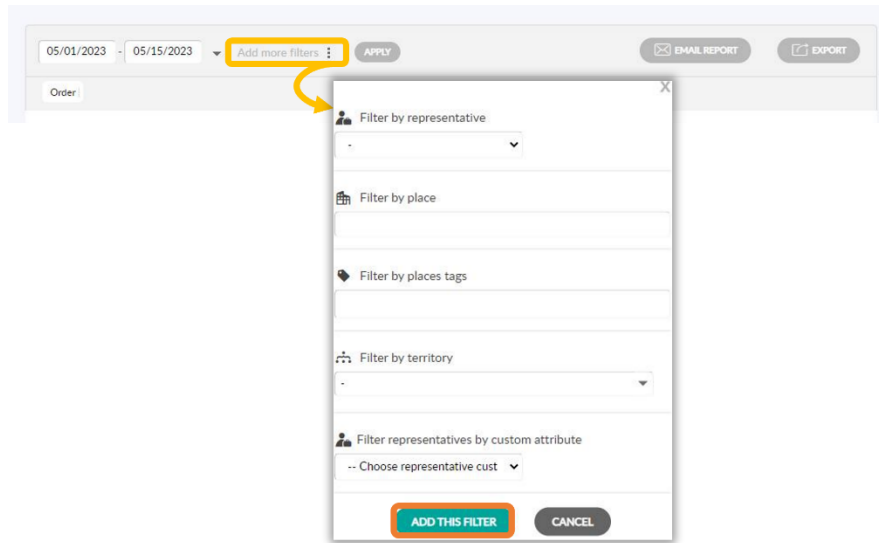
4. You will see a **data table** showing coverage by the **whole company**, **territory**, and **representatives**. Click **Export** to get the data.

Coverage Report
Analyze how well your team is covering the territory

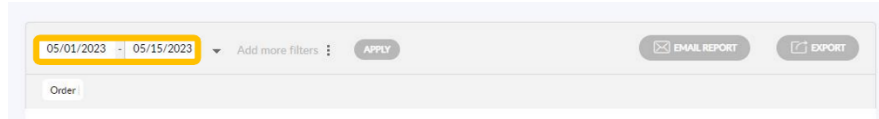|	Total places	Places visited	Coverage (%)	Time traveling	Time at place	Link to coverage lists
Whole company	32	0	0 %		-	Places visited / Places not visited
Territories						
Orange Park	-	0	-	-	-	Places visited / Places not visited
Blanding	8	0	0 %	-	-	Places visited / Places not visited
OakLeaf	10	0	0 %	-	-	Places visited
Representatives						
Lyssa Ireland Thomas	25	0	0 %	-	-	Places visited / Places not visited
Dolly Barkon	2	0	0 %	-	-	Places visited / Places not visited
LaBiscuit Shenault	2	0	0 %	-	-	Places visited / Places not visited

5. Your **exported data** can be shared or manipulated from here.

Whole Company

	Total places	Places visited	Coverage percentage	Time traveling	Time at place
1	Total places	Places visited	Coverage percentage	Time traveling	Time at place
2	32	0	0 %	-	-

Territories

	Name	Total places	Places visited	Coverage percentage	Time traveling	Time at place
1	Name	Total places	Places visited	Coverage percentage	Time traveling	Time at place
2	Orange Park	0	0	0 %	-	-
3	Blanding	8	0	0 %	-	-
4	OakLeaf	10	0	0 %	-	-
5	Jacksonville	0	0	0 %	-	-
6	Riverside	0	0	0 %	-	-
7	Avondale	0	0	0 %	-	-
8	San Marco	0	0	0 %	-	-
9	Fleming Island	0	0	0 %	-	-
10	Orlando	0	0	0 %	-	-
11	Watermill	2	0	0 %	-	-
12	Chimney Lakes	0	0	0 %	-	-
13	Westside	3	0	0 %	-	-
14	Murray Hill	1	0	0 %	-	-
15	Mandarin	3	0	0 %	-	-
16	Universal	0	0	0 %	-	-
17	WDW	0	0	0 %	-	-
18	CFU	0	0	0 %	-	-
19	Gainesville	0	0	0 %	-	-
20	University of Florida Campus	0	0	0 %	-	-
21	3rd party	2	0	0 %	-	-
22	NA	0	0	0 %	-	-

Representatives

	Name	Total places	Places visited	Coverage percentage	Time traveling	Time at place
1	Name	Total places	Places visited	Coverage percentage	Time traveling	Time at place
2	Lyssa Ireland Thomas	25	0	0 %	-	-
3	Dolly Barkon	2	0	0 %	-	-
4	LaBiscuit Shenault	2	0	0 %	-	-
5	Fluffycorn Thomas	2	0	0 %	-	-
6	Frank Repsly	0	0	0 %	-	-
7	Ryan Repsly	0	0	0 %	-	-
8	Ryhanna Repsly	0	0	0 %	-	-
9	Ralph Repsly	0	0	0 %	-	-
10						

Short text, long text, section headers, barcodes, and products can't be reported on.

Emailing Reports

Anywhere you see an **Email Report** button, you can schedule an emailed report of the information on the screen for Repsly users.
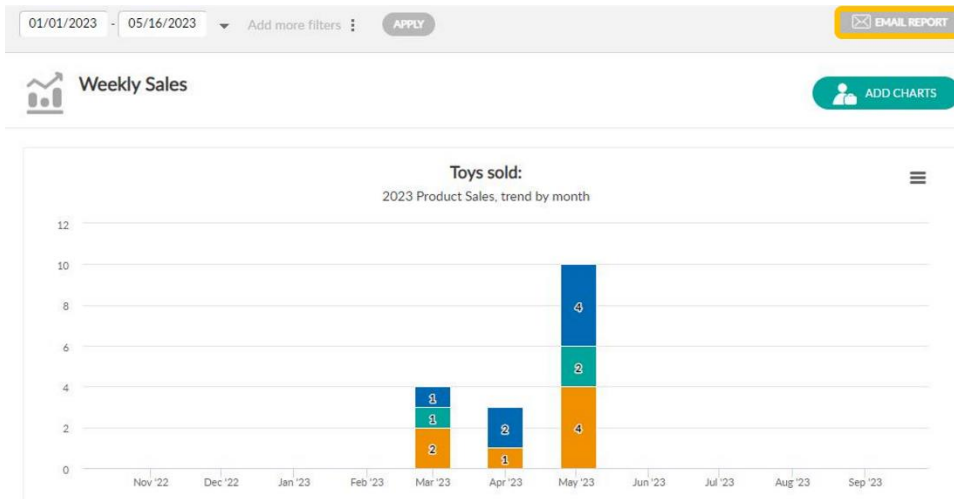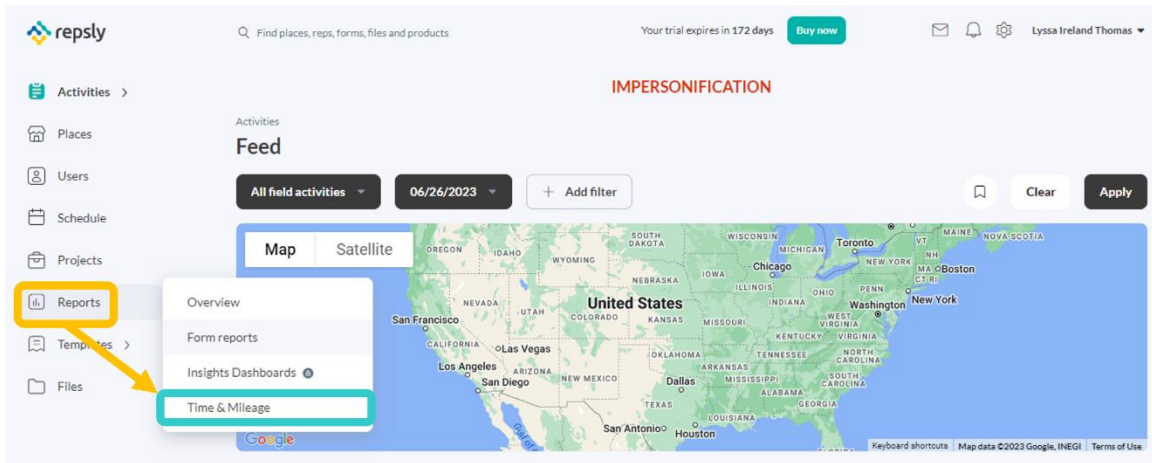

1. Complete the following information:

    a. **Send Frequency**

    b. **Starting Date**

    c. **Time of Date**

    d. **Recipient** (report can only be sent to Repsly users)

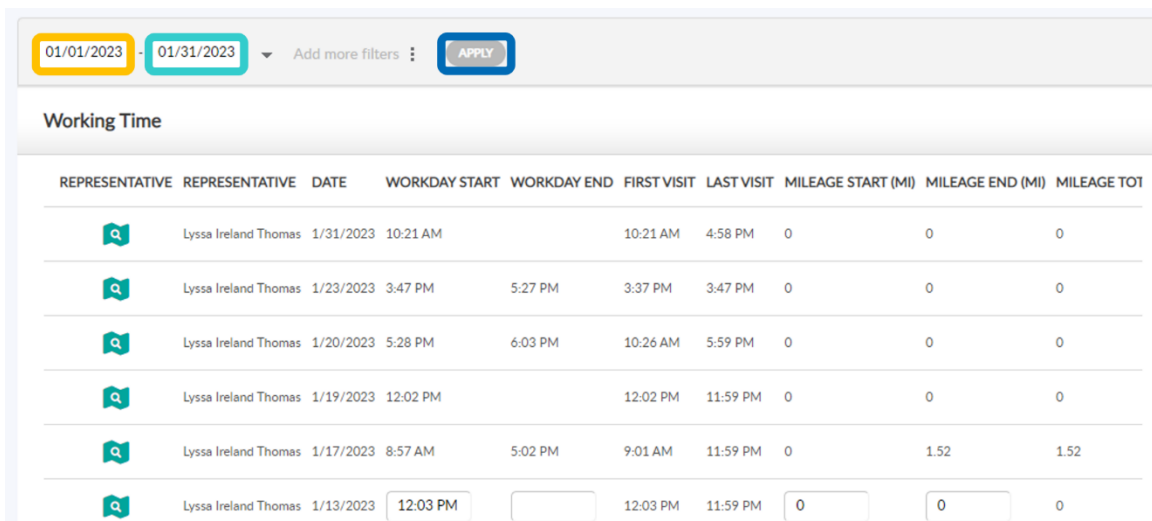vi. Click **Save**.

2. The sales report will appear in your email on the date and time specified.
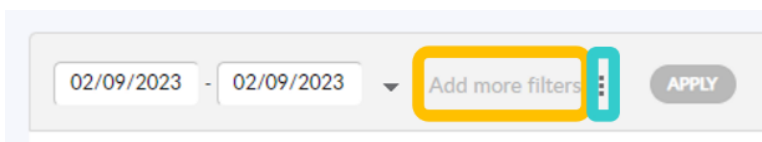
Time & Mileage Report

1. Click **Reports** > select **Time & Mileage**.
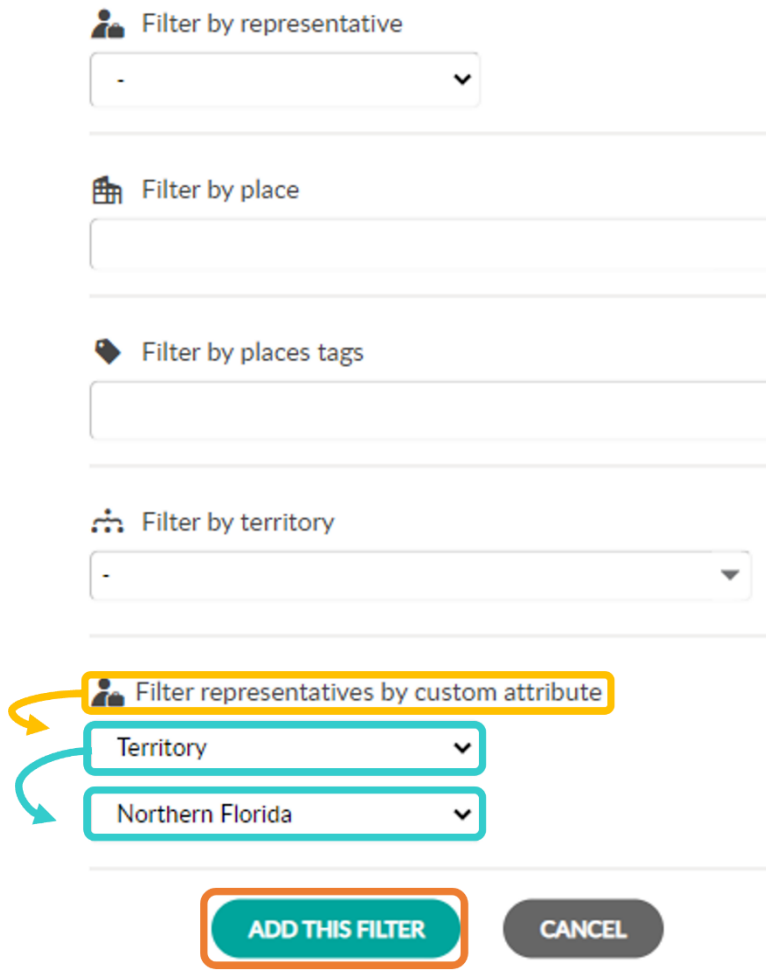
2. Under the filters, select the **Start Date** and **End Date** of the period you want to review > click **Apply**.

3. Next to **Add More Filters**, select the **three dots**.

4. Select the filter that will restrict the list to your reps (in this example, **Custom Attribute**) > drill down with the options of the Custom Attribute until you can select the **appropriate filter** > select click **Add This Filter**.

Filtering by Custom Attribute can make it easy to see your reps quickly.

To learn how to create Custom Attributes for Reps, use the following link:

How to create and manage custom attributes for representatives

Quality Checking the Time and Mileage Report

As you roll over the report, you will see that Backoffice Users can update the following fields:

- Workday Start

- Workday End

- Mileage Start (MI)

- Mileage End (MI)

Exporting the Time and Mileage Report

1. Scroll down to the bottom of the screen > click **Export**.

2. Select **Export Type** > click **OK**.
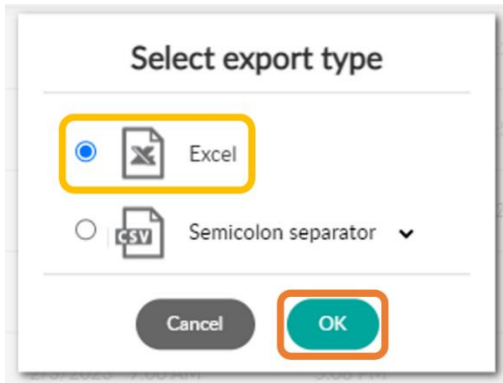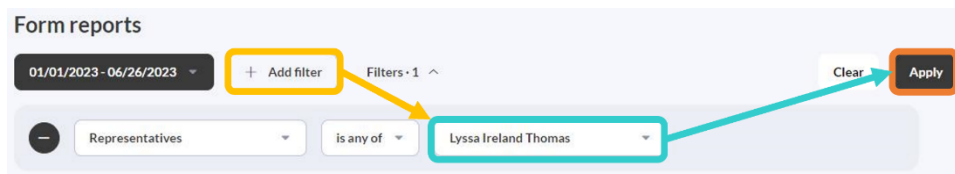

3. Open and save the report.

Form Reports

1. Click **Reports** > select **Forms Reports**.
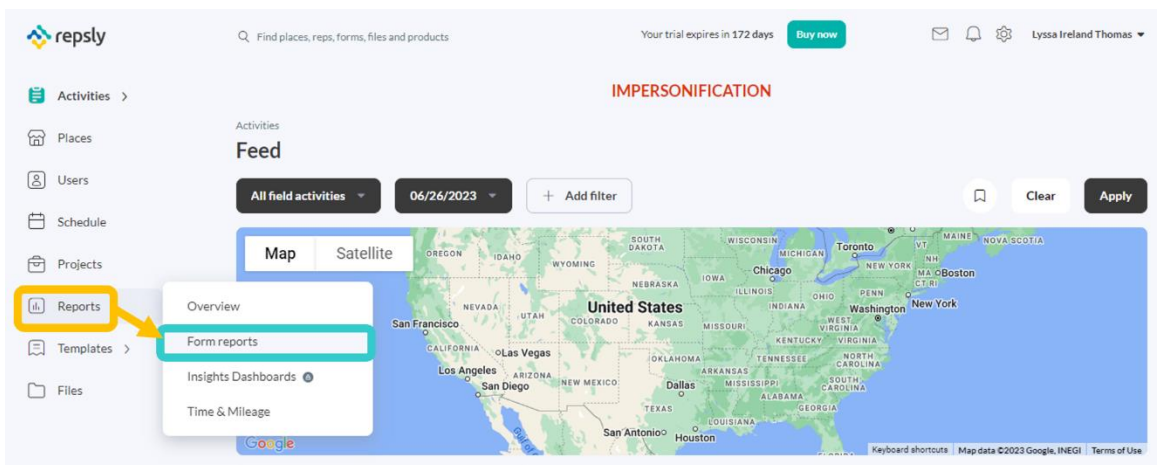
2. Under the filters, select the **Start Date** and **End Date** of the period you want to review.

Form reports

01/01/2023 - 06/26/2023 ▾   + Add filter

Q Search forms
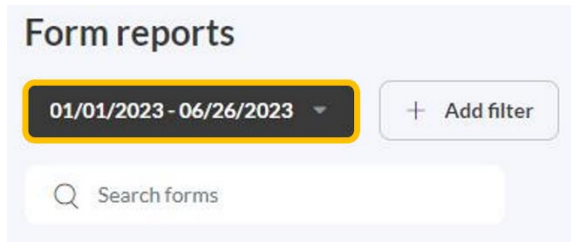
3. Click **+ Add Filters** > Select **filter** > click **Apply**.

Form reports

01/01/2023 - 06/26/2023 ▾   + Add filter   Filters · 1 ^   Clear   Apply

— | Representatives ▾ | is any of ▾ | Lyssa Ireland Thomas ▾

4. Select the **form**.

Form reports

01/01/2023 - 06/26/2023 ▾   + Add filter   Filters · 1 ^   Clear   Apply

— | Representatives ▾ | is any of ▾ | Lyssa Ireland Thomas ▾

Q Search forms

Form ⇕	Active	Submissions
2023 Celebridog Product Sales	● Active	7
2023 Customer Conversations	● Active	6
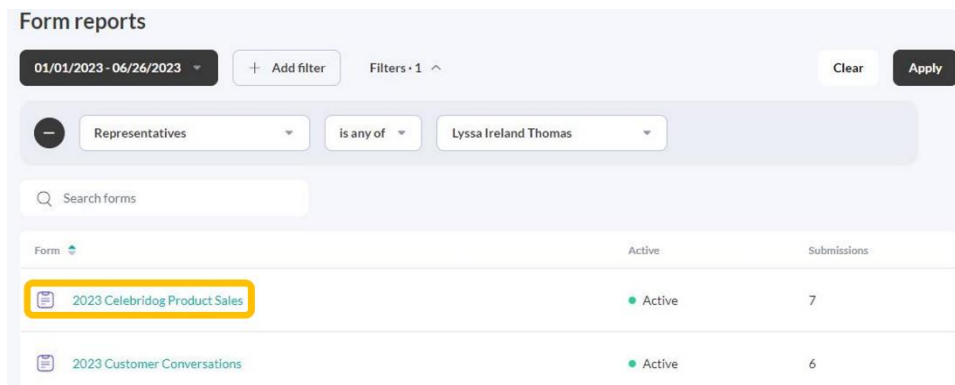
5. You can now see the results for that form using the filters selected.

2023 Celebridog Product Sales ▾   ⬇ Export

01/01/2023 - 12/31/2023 ▾   + Add filter   Filters · 1 ▾   Clear   Apply

Summary   Submissions

Was the Doggie Selfie Stick on the shelf?
0%
14%
86%
● Yes 6
● No 1
● None 0

Did you sell a new product?
0%
43%
57%
● Yes 4
● No 3
● None 0