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Welcome to Repsly U!



# WELCOME TO REPSLY U!

## The Power of Reporting

Presented by:

- Lyssa Ireland Thomas – Customer Success Manager
- Bruno Knego – Customer Success Manager

June 29, 2023



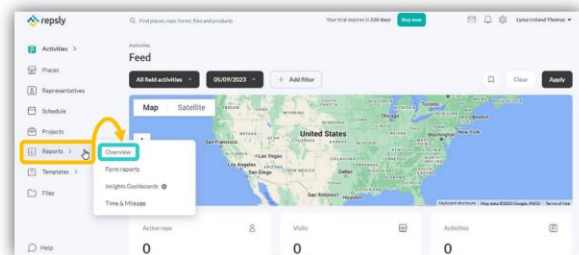
What is Reporting?

## 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.

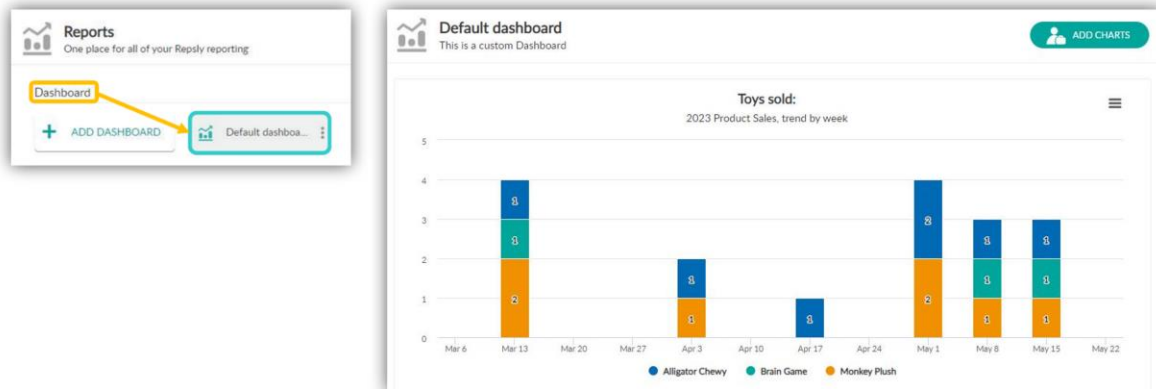
Examples of reports in Repsly are as follows:

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



# Dashboard Report

## Dashboard Report



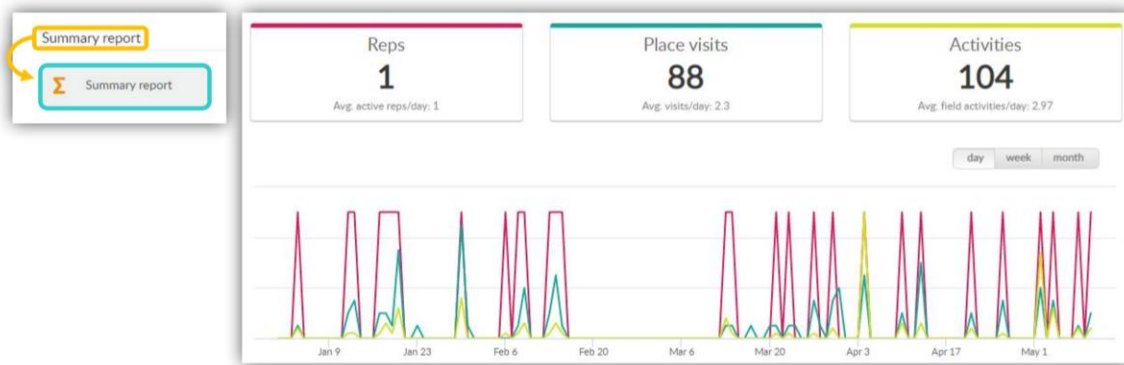
You can customize and build your own custom dashboard by extracting the information you want based on the form you have filled out and pinning them on the dashboard.

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

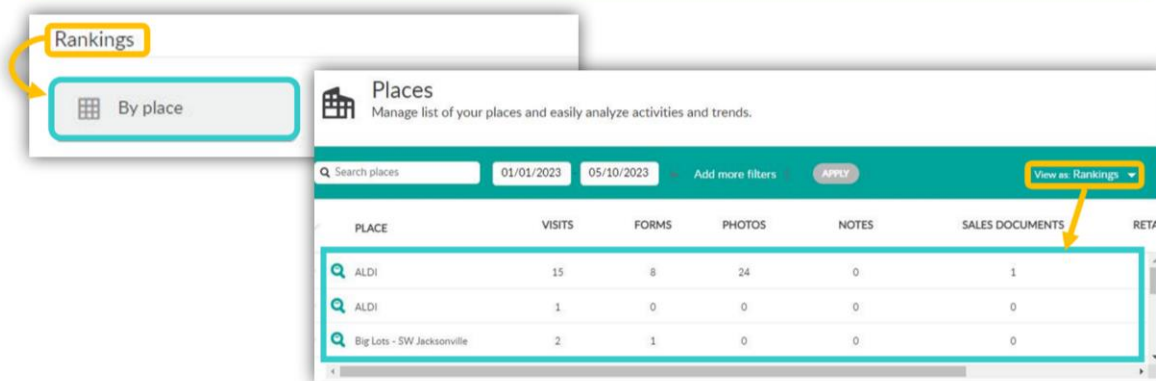
### Summary Report



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

## Rankings Report

### 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:

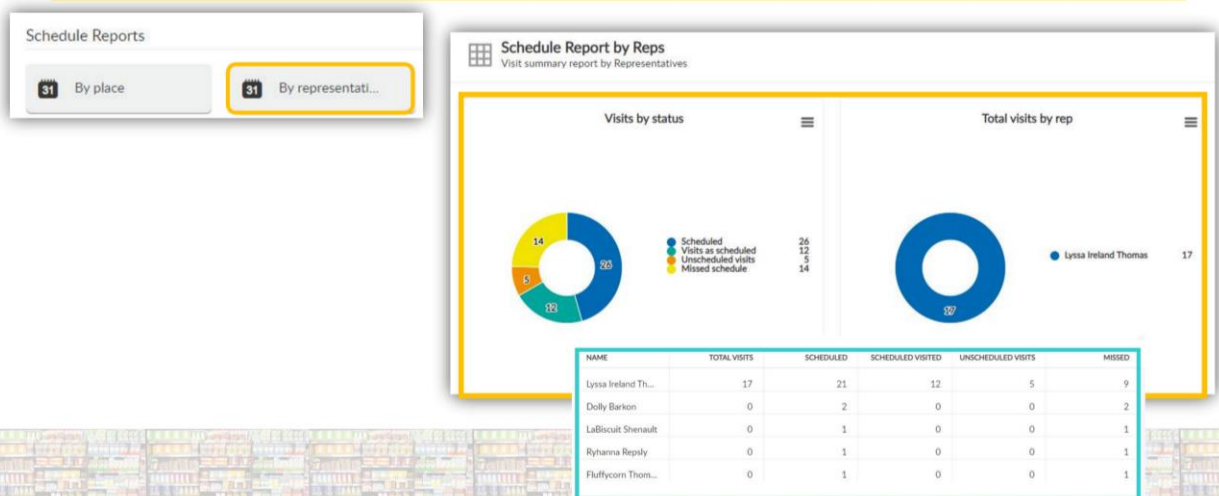
- Sales by Product
- Sales by Product Group
- Sales by Place
- Sales by Territory
- Sales by Rep

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



Schedule Report by Rep/Place

## Schedule Report by Rep



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

## Coverage Report

### Coverage Report

	Total places	Places visited	Coverage (%)	Time traveling	Time at place	Link to coverage site
Whole company	36	0	0%	-	-	<a href="#">Places not visited</a>
<b>Territories</b>						
Orange Park	-	0	-	-	-	<a href="#">Places not visited</a>
Blanding	9	0	0%	-	-	<a href="#">Places not visited</a>
OakLeaf	10	0	0%	-	-	<a href="#">Places not visited</a>
<b>Representatives</b>						
Lyssa Ireland Thomas	29	0	0%	-	-	<a href="#">Places not visited</a>
Dolly Barkon	2	0	0%	-	-	<a href="#">Places not visited</a>
LaBiscuit Shernault	2	0	0%	-	-	<a href="#">Places not visited</a>

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

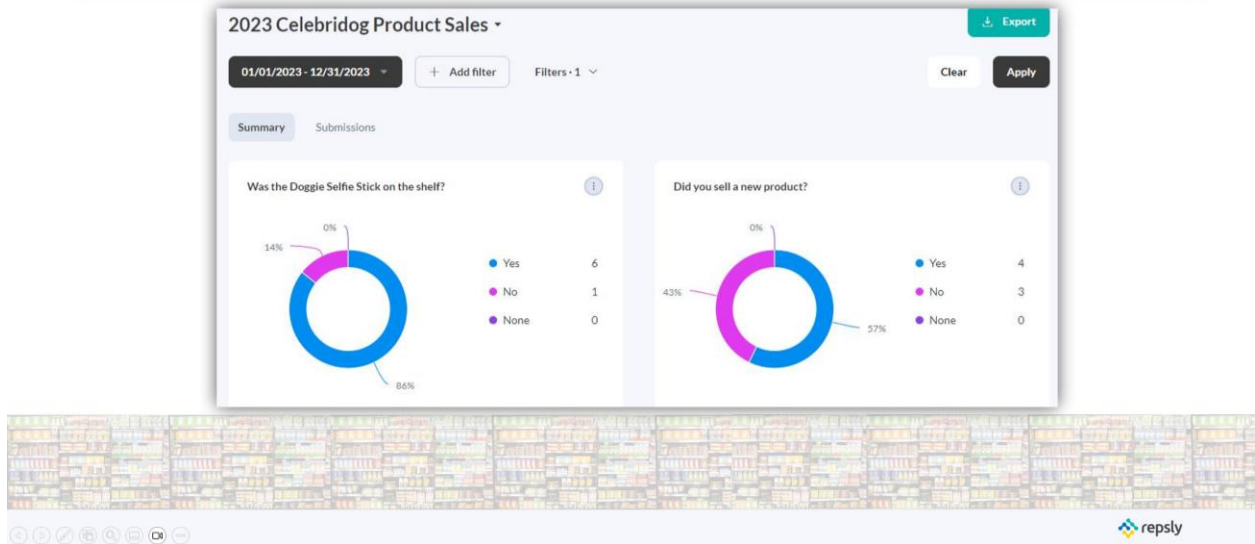
### Time and Mileage Tracking

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

### Form Report

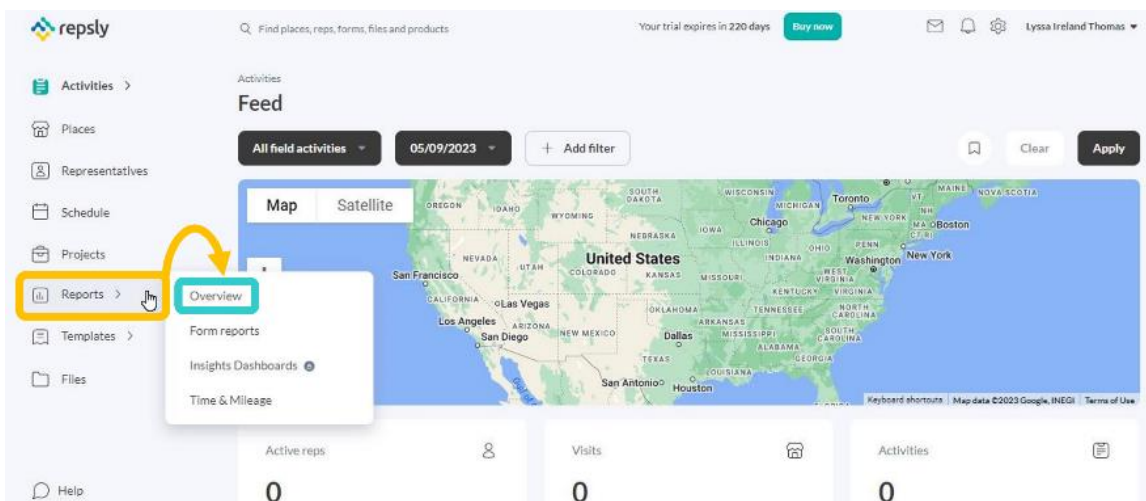


Our new Form Report makes it easy for field team managers to filter the data their team collects in the field and drill down with specific views for the accounts, products, in-store conditions, or reps that matter most.

## 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.



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

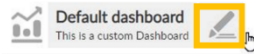


- **Chart Context Menu** (hamburger menu): a menu that allows you to pin the chart to the dashboard, remove the chart from the dashboard, or export the chart.





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



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

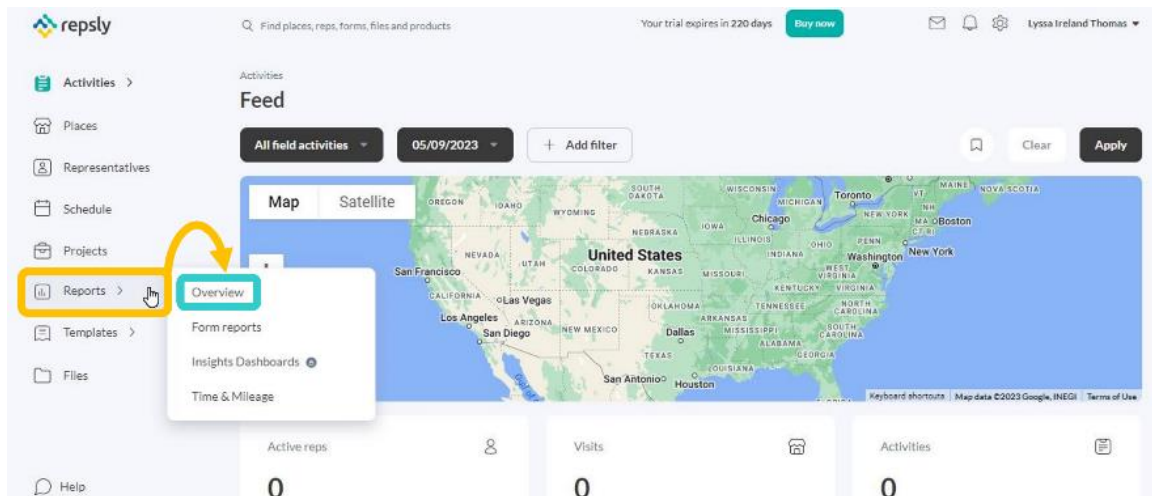


## Understanding the Different Reports in Repsly

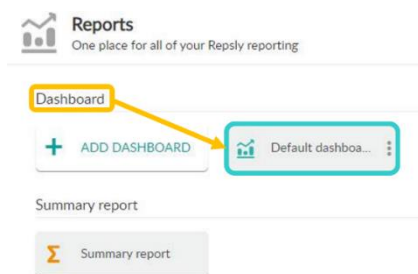
Different reports meet a variety of needs. Let's review the various reports to see what fits your needs best.

### Dashboard

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

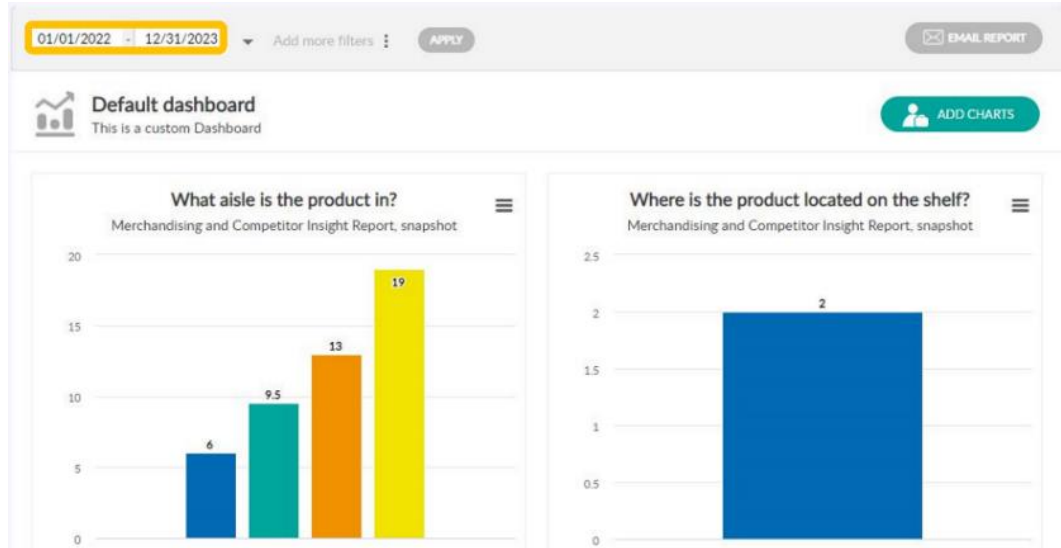


2. Under **Dashboard** > select **Default Dashboard**.

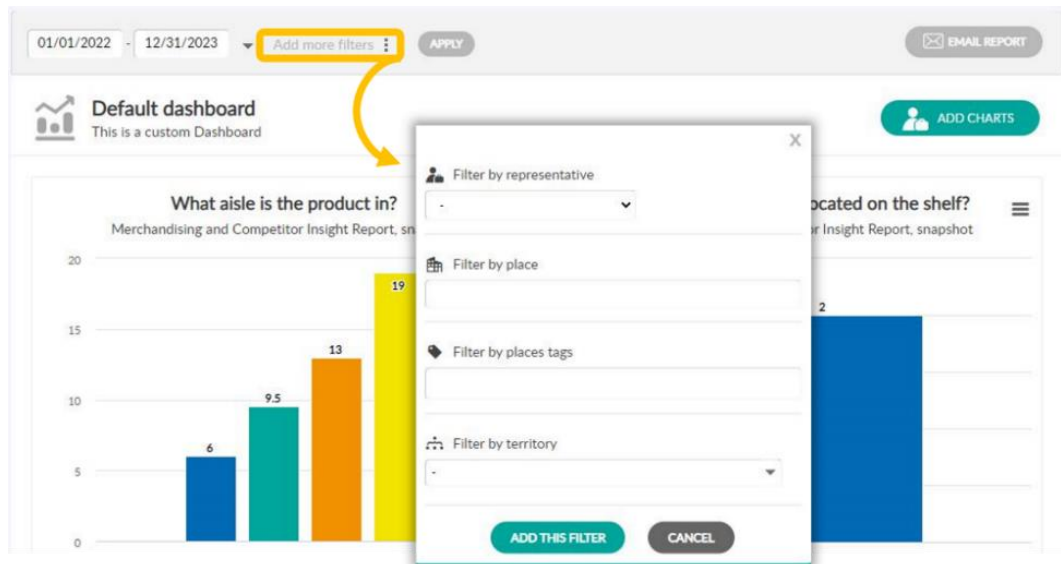


3. From this view, you can do the following:

a. Filter by date



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



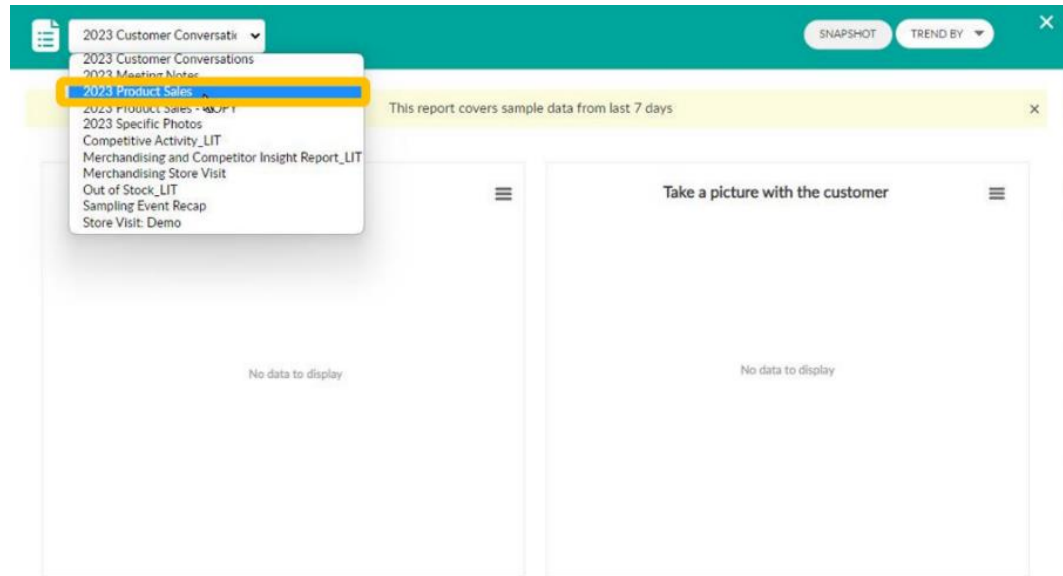
- 4. Look under the chart question to see which **form** correlates with the question. This example, it's a **Snapshot** from the Merchandising and Competitor Insight Report.



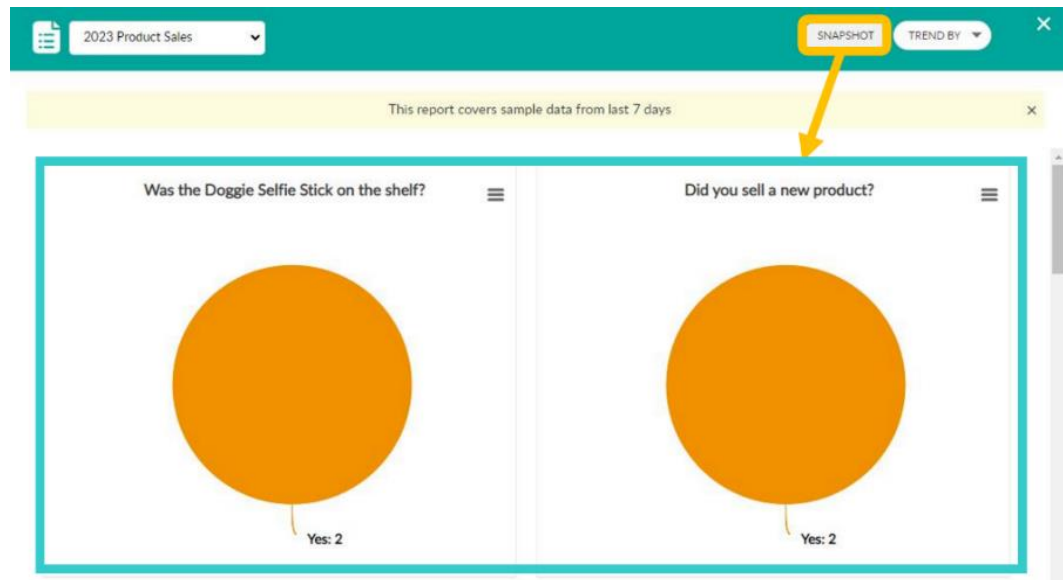
- 5. To add more charts to the dashboard, click **Add Charts**.



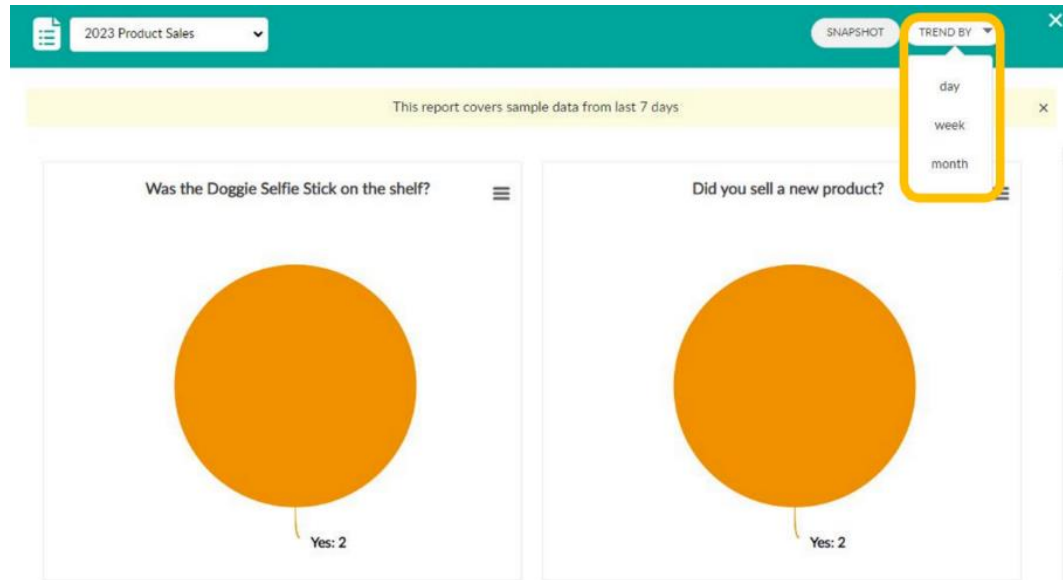
- a. Select the **form** that contains the question you want to build a chart.



- b. A **Snapshot** of the **questions** will appear.

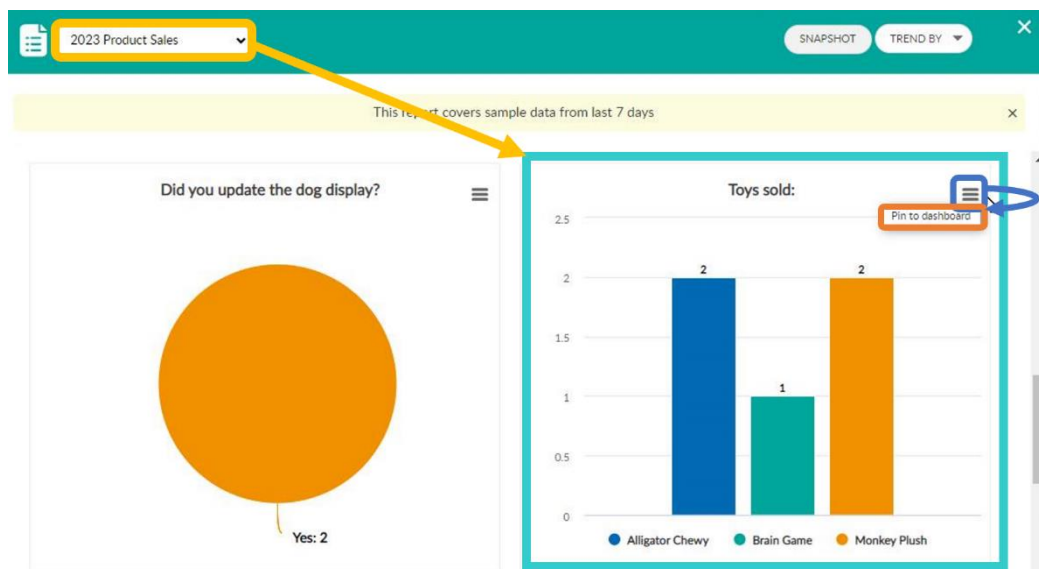


- c. You can trend the charts by the following time ranges (Day, Week, or Month).

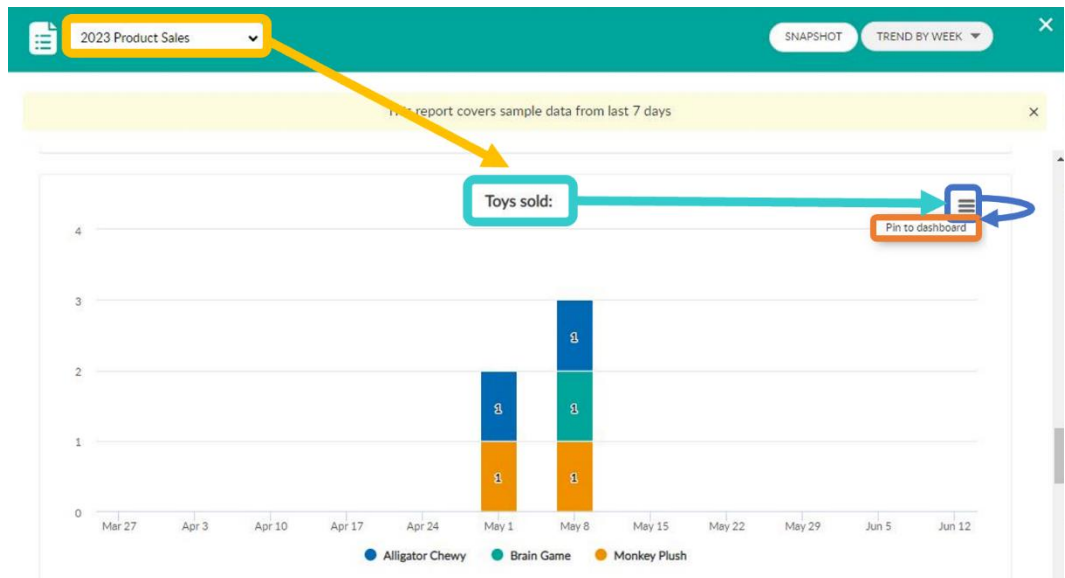


- d. With the correct **form** selected, scroll down until you see the **question** you want to add to the dashboard > click the **Chart Context Menu** (hamburger menu) > and click **Pin to Dashboard**.

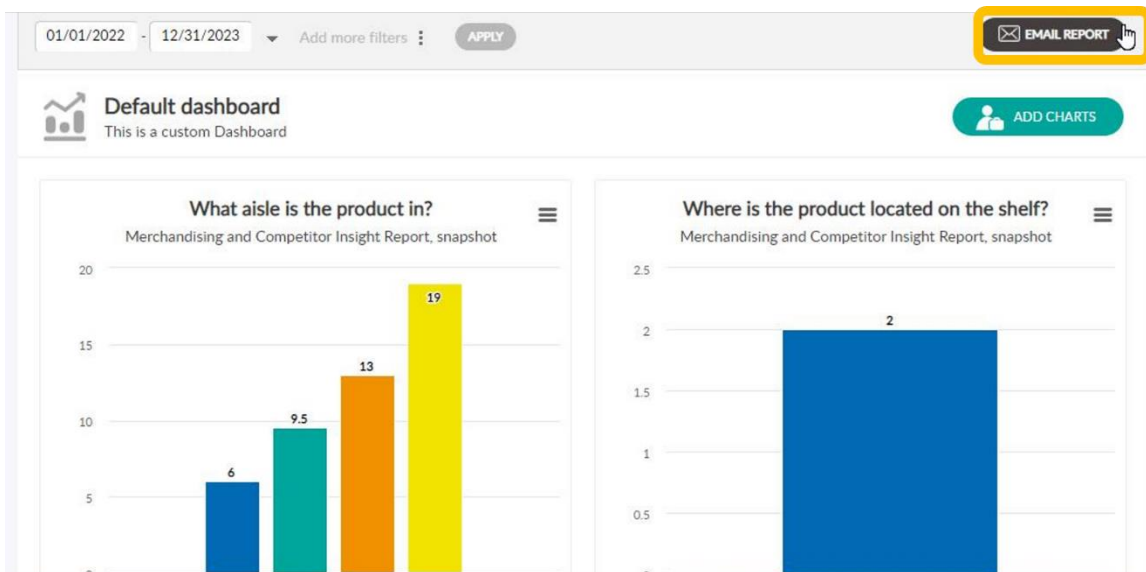
- i. **Snapshot** example:



ii. **Trend by Week** example



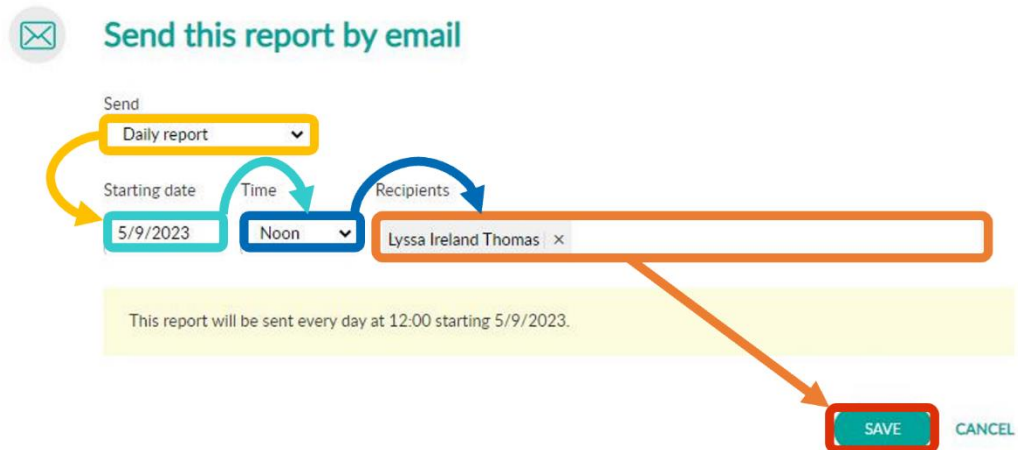
6. If you want to receive an Email Report from your Dashboards, click **Email Report**.



a. Complete the following information:

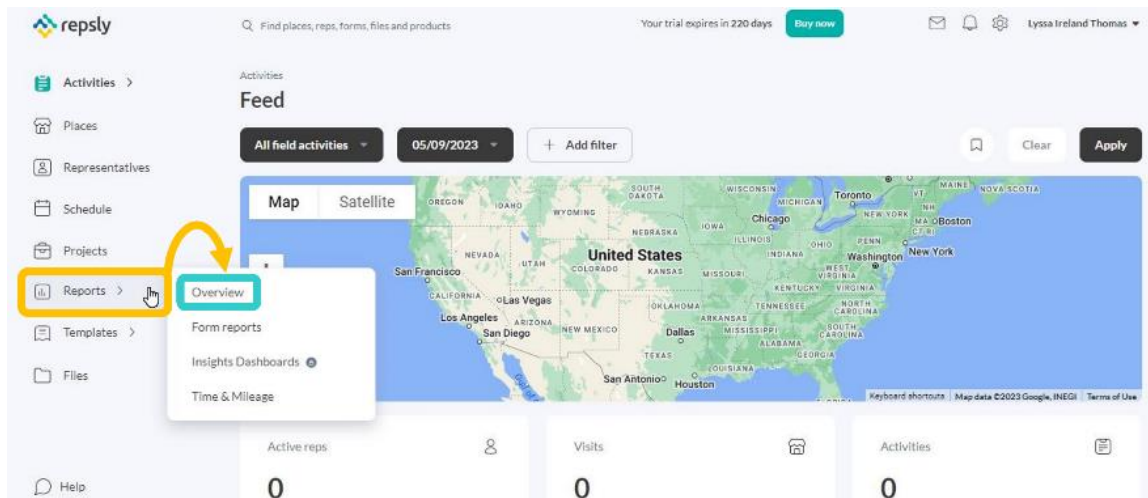
- i. **Send Frequency**
- ii. **Starting Date**
- iii. **Time of Day**

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

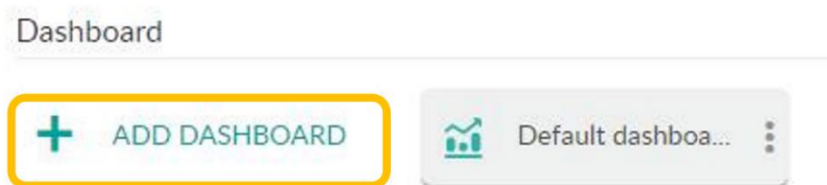


## Create a Custom Dashboard

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



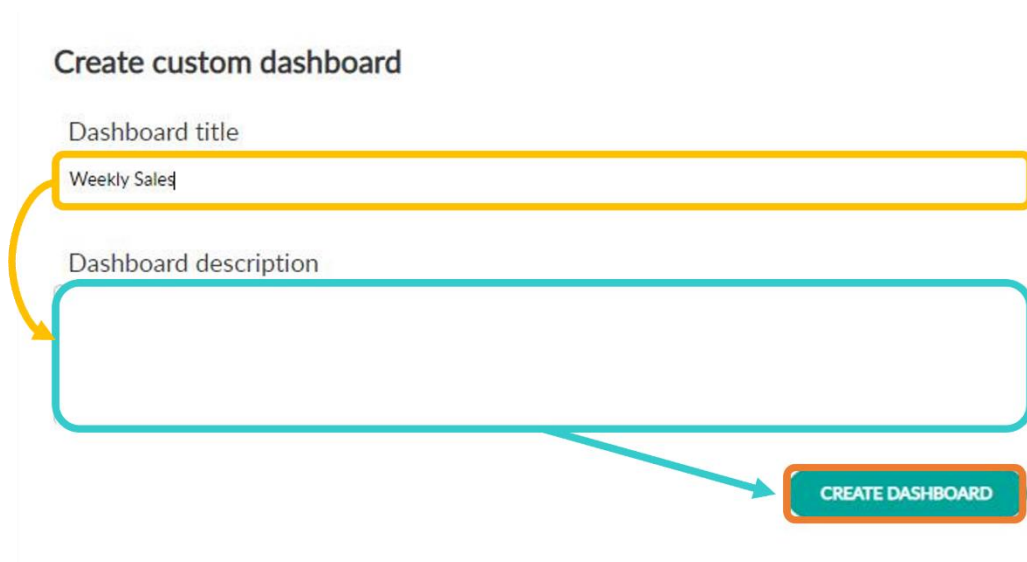
- 2. Under **Dashboard** > select **+ Add Dashboard**.



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

c. **Dashboard Title**

d. **Dashboard Description**



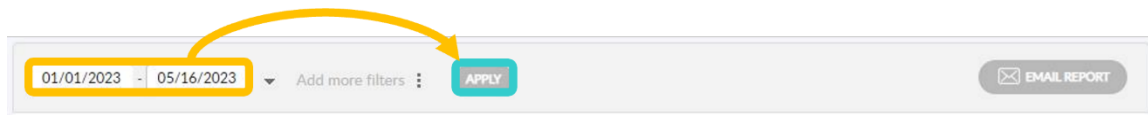
Create custom dashboard

Dashboard title  
Weekly Sales

Dashboard description

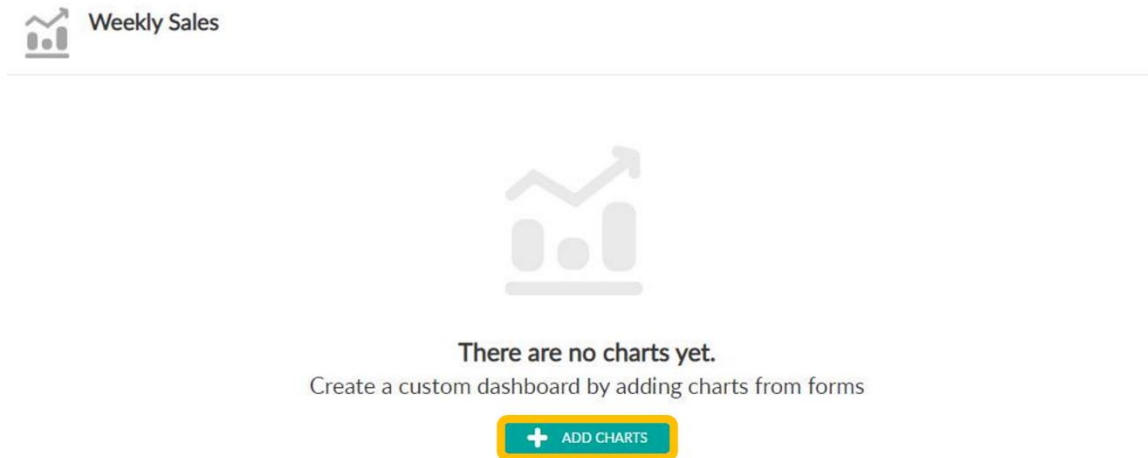
CREATE DASHBOARD

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**.



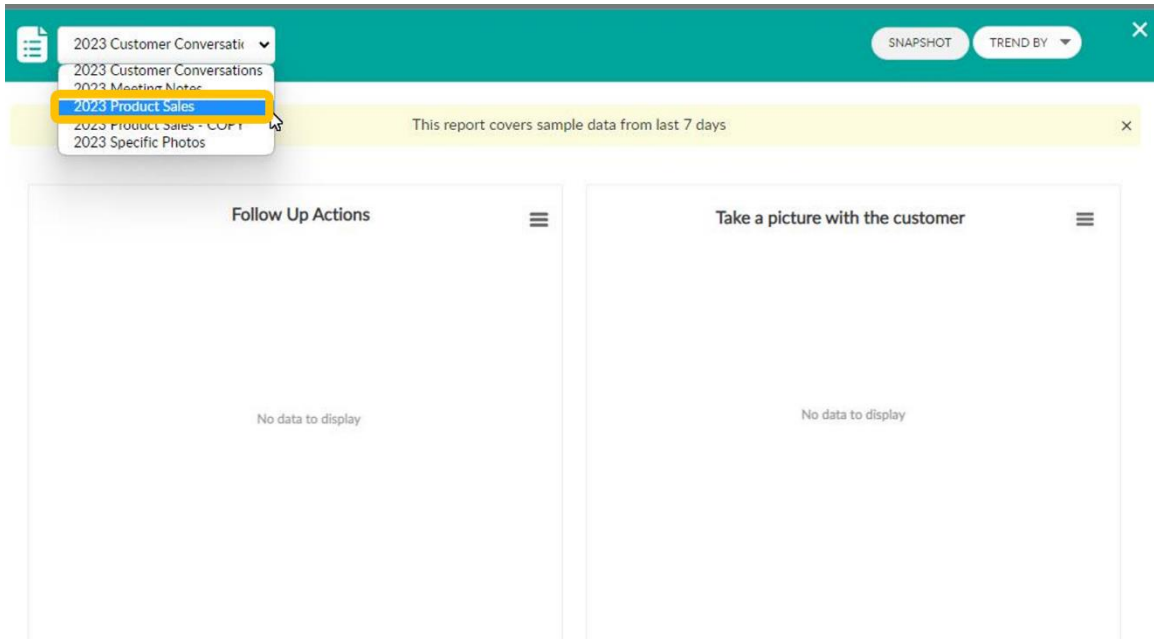
Weekly Sales

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

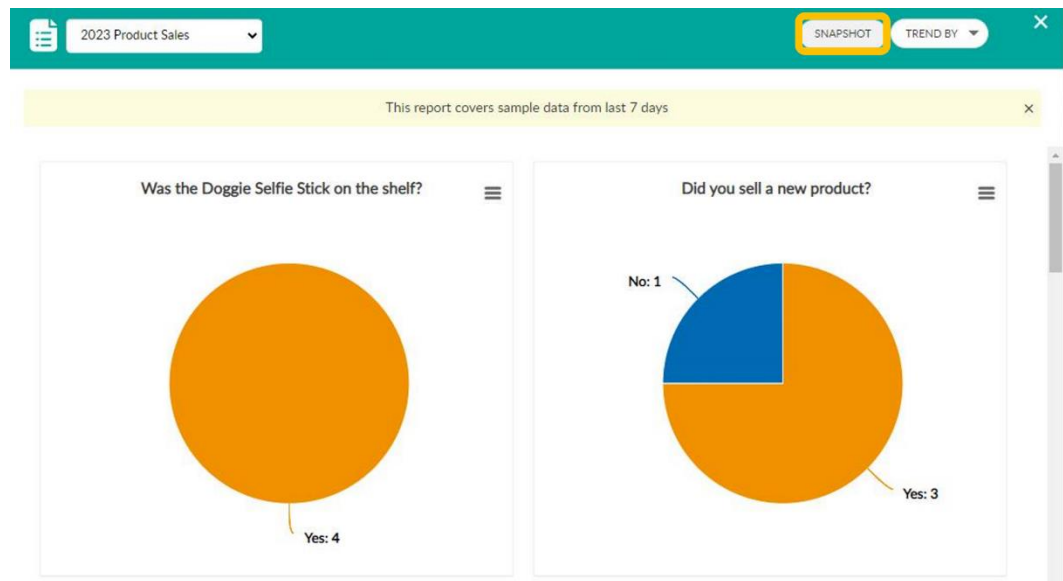
+ ADD CHARTS



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



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

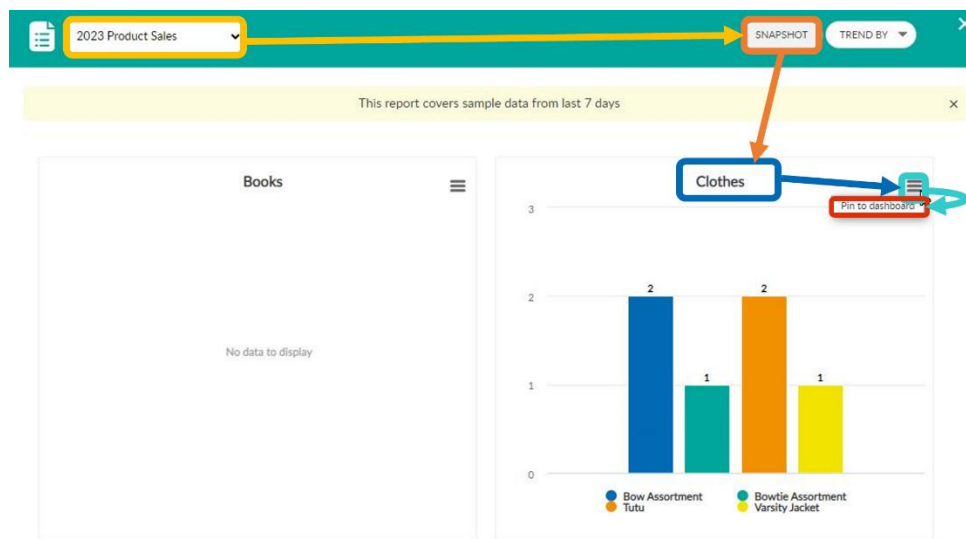


- b. You can trend the charts by the following time ranges (Day, Week, or **Month**).



- 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:

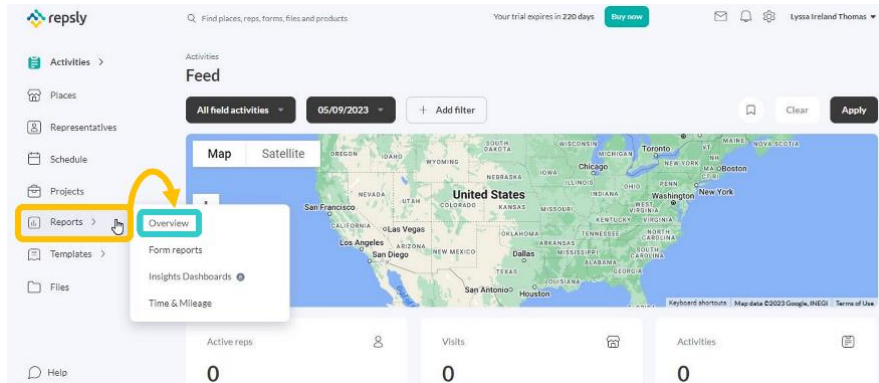


5. The following dashboard will result from our actions. You can set up an [Email Report](#) if you want this information delivered to your email on a set schedule.

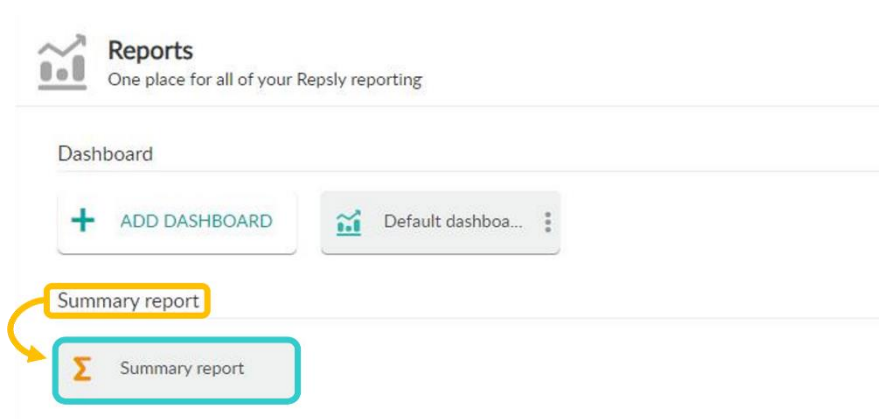


## Summary Report

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

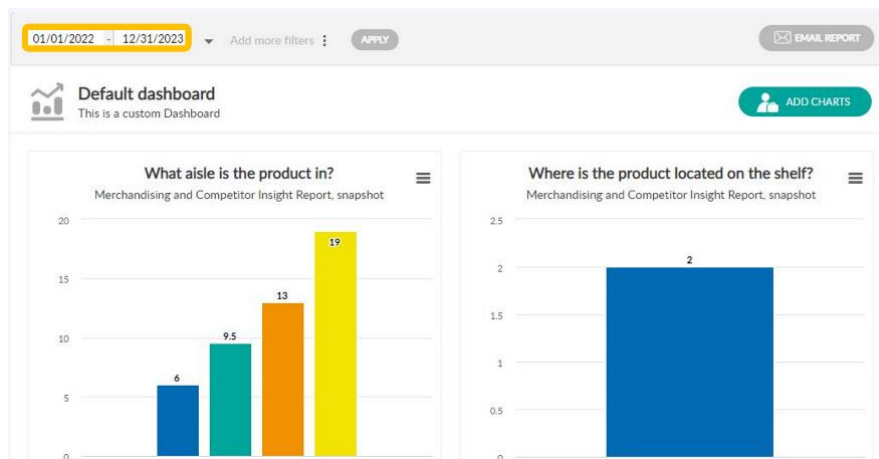


2. Under **Summary Report** > select **Summary Report**.

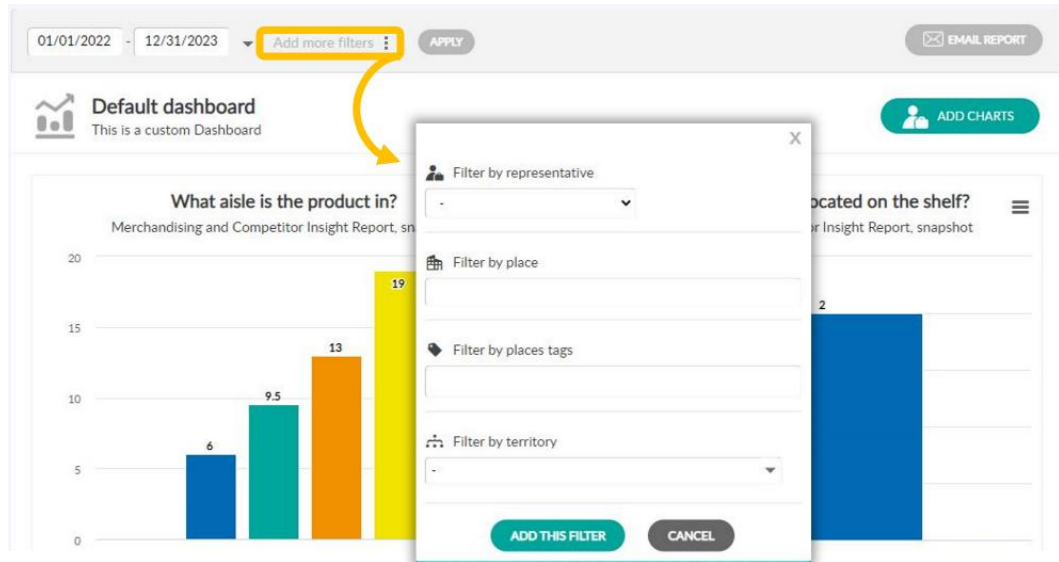


3. From this view, you can do the following:

a. **Filter by date**

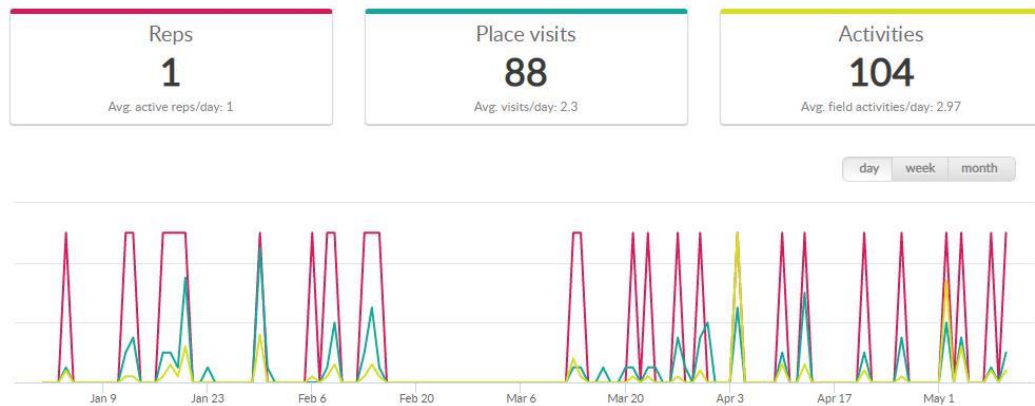


b. Add more filters > click the **three dots** (kebab menu) to open.

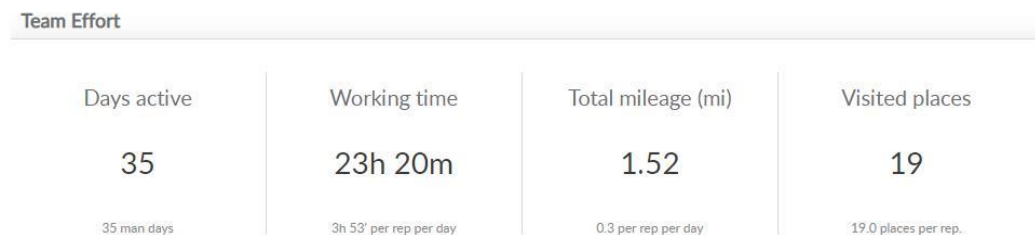


4. This screen gives you summary information about your Replsly Usage. This is a great place to grab screenshots for presentations.

a. Reps, Place Visits, and Activities



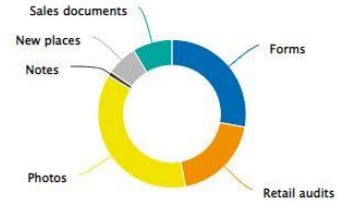
b. Team Effort



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

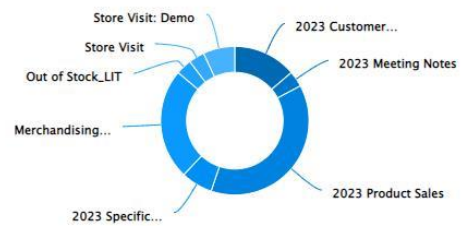
Total visits done	88
Scheduled	176
Visited as scheduled	56
Unscheduled visits	32
Missed schedule	119



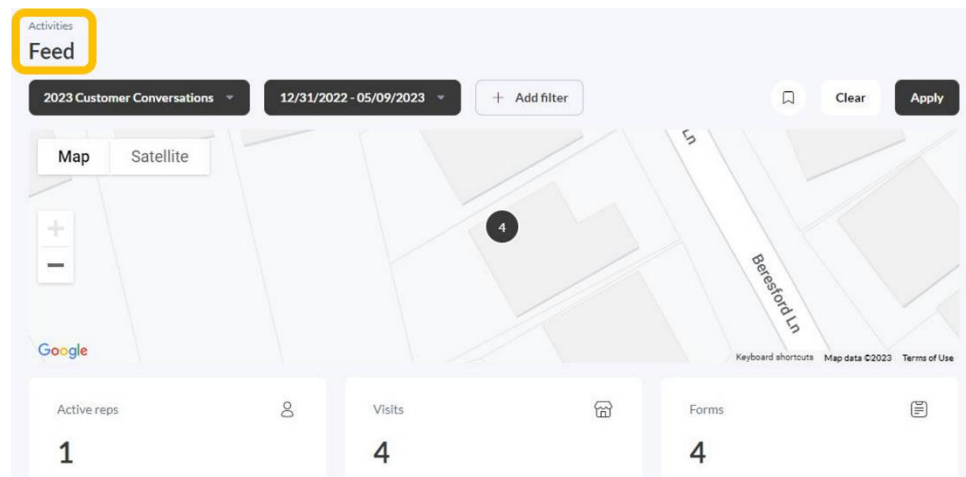
e. Forms

Forms

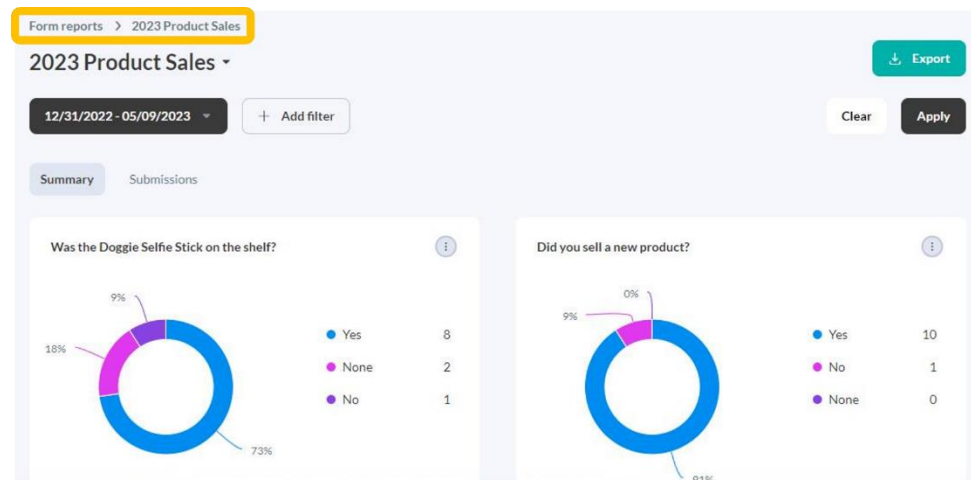
2023 Customer Conversations	4		
2023 Meeting Notes	1		
2023 Product Sales	11		
2023 Specific Photos	2		
Merchandising and Competitor Insight Report_LIT	7		
Out of Stock_LIT	1		



i. Plain List (Click > you will go to the **Activities Feed**)



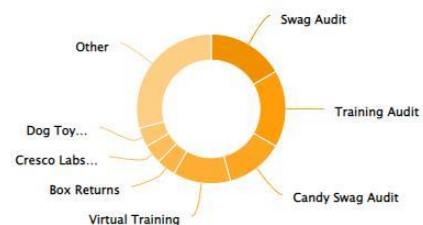
ii. Summary Report (Click > you will go to the **Form Reports**)



## f. Retail Audits

### Retail audits

<input checked="" type="checkbox"/> Box Returns	1
<input checked="" type="checkbox"/> Candy Swag Audit	3
<input checked="" type="checkbox"/> Cresco Labs Tracker	1
<input checked="" type="checkbox"/> Dog Toy Competitive Audit	1
<input checked="" type="checkbox"/> Dog Toy Demo Audit	1
<input checked="" type="checkbox"/> Dog Toy Retail Audit	1
<input checked="" type="checkbox"/> Swag Audit	1



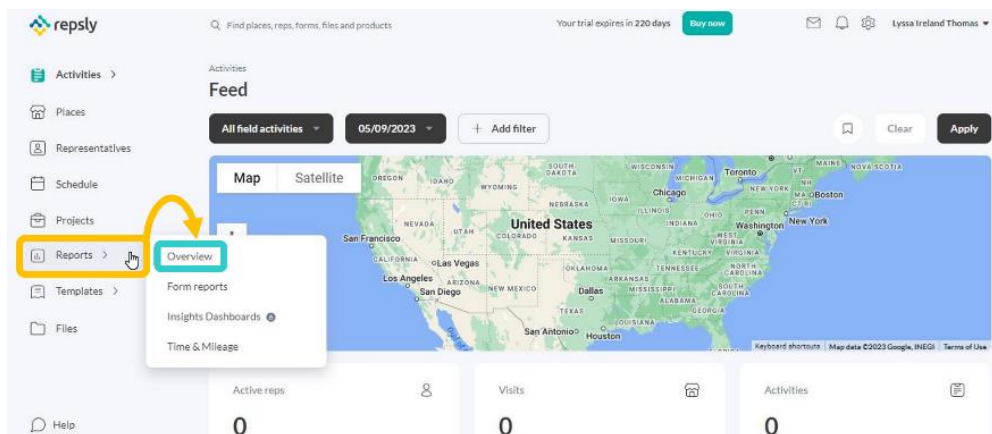
g. Sales and Merchandising

Sales and Merchandising			
	Order	3	Total: <b>\$24.53</b>
	Order_LIT	4	Total: <b>\$14.96</b>
	Return Boxes	2	

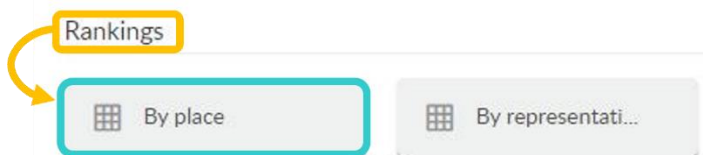
Rankings

Rankings by Place

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

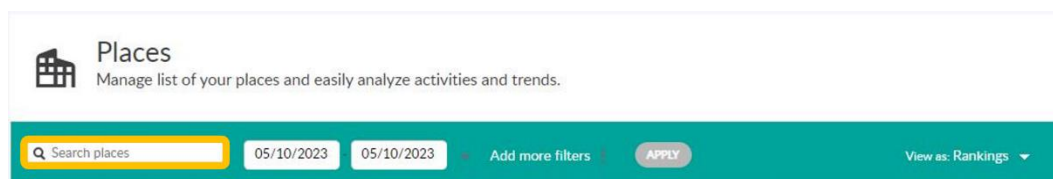


2. Under **Rankings** > select **By Place**.



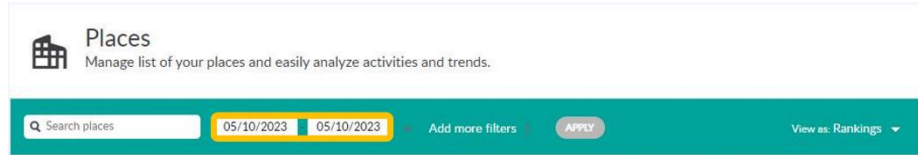
3. From this view, you can do the following:

a. Search Places

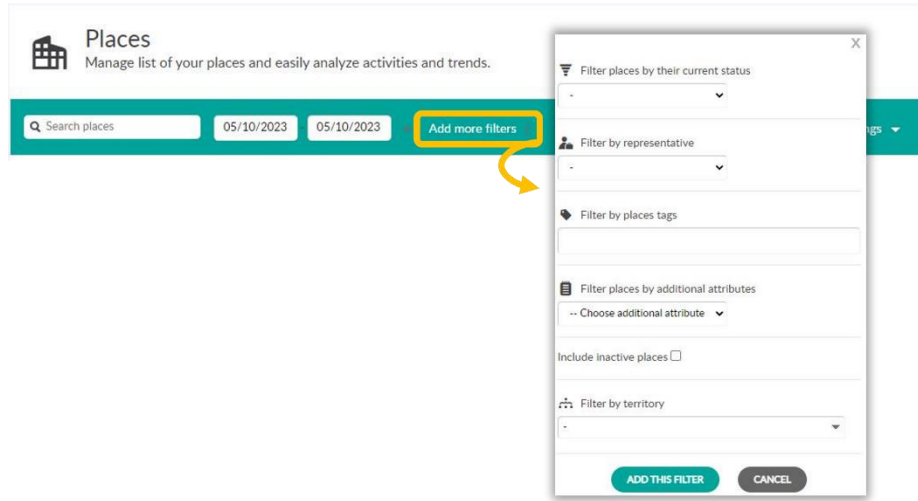




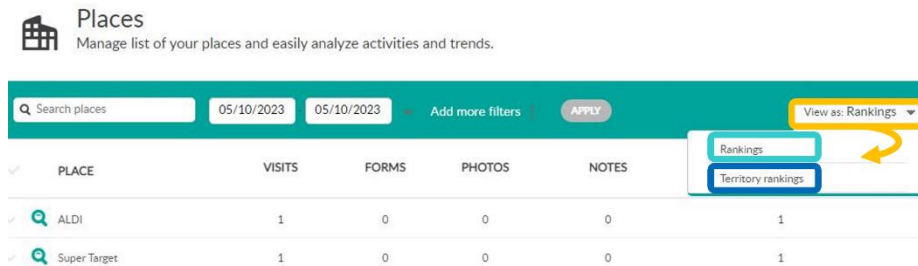
**b. Filter by date**



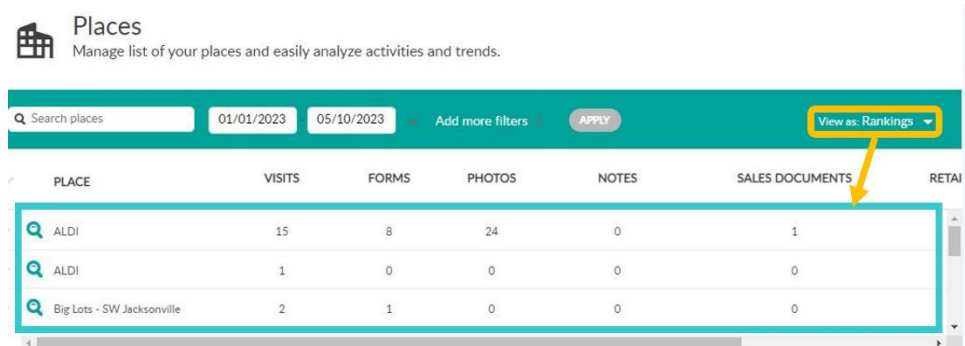
**c. Add more filters** > click the **three dots** (kebab menu) to open.



**d. View as:**



**i. Rankings**



## ii. Territory Rankings

**Places**  
Manage list of your places and easily analyze activities and trends.

Search places: [ ] 05/10/2023 05/10/2023 Add more filters APPLY View as: Territory rankings

TERRITORY	VISITS	FORMS	PHOTOS	NOTES	SALES DOCUMENTS	RETAIL AUDITS
OakLeaf	2	0	0	0	2	0

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

**Places**  
Manage list of your places and easily analyze activities and trends.

Search places: [ ] 01/01/2023 05/10/2023 Add more filters APPLY View as: Rankings

PLACE	VISITS	FORMS	PHOTOS	NOTES	SALES DOCUMENTS	RETAIL AUDITS
ALDI	15	8	24	0	1	
ALDI	1	0	0	0	0	
Big Lots - SW Jacksonville	2	1	0	0	0	

Showing 10 out of 19 records

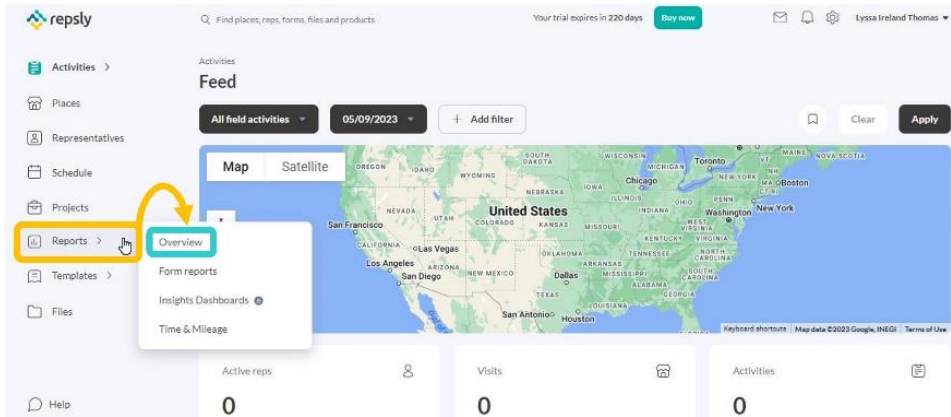
**EXPORT**

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

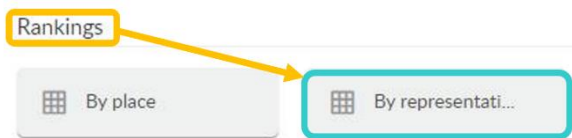
ID	Name	Orders	Total forms	Total visits	Total photos	Total messages	Retail audits	Total
2	ALDI	1	8	15	24	0	3	9.9800
3	Super Target	1	0	12	2	0	2	4.9800
12	Pet Supplies Plus	0	6	4	0	0	1	0.0000
4	Publix Super Market	1	1	2	0	0	0	9.9800
6	CVS Pharmacy	1	2	4	0	0	0	9.9800
7	PetSmart	0	4	8	1	0	1	0.0000
14	Dollar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

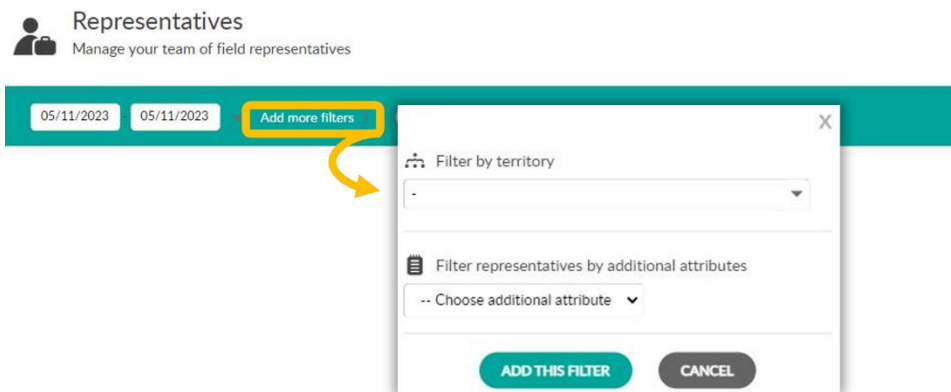


3. From this view, you can do the following:

a. **Filter by date**



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



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

**Representatives**  
Manage your team of field representatives

01/01/2023 05/11/2023 Add more filters APPLY

REPRESENTATIVE	WORKING TIME	VISITS	PLACES VISITED	FORMS	PHOTOS	SALES DOCUM
Lyssa Ireland Thomas	23h 17'	88	19	29	38	9
Dolly Barkon	0h 00'	0	0	0	0	0
Fluffycorn Thomas	0h 00'	0	0	0	0	0

Showing 8 out of 8 records

EXPORT

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

ID	Name	Note	Orders	Total forms	Total visits	Total photos	Place notes	Retail audits	Places visited	Total	Working time	Time at place (minutes)
1235	Dolly Barkon		0	0	0	0	0	0	0	0.0000	0	0
fluffster0807	Fluffycorn Thomas		0	0	0	0	0	0	0	0.0000	0	0
FREP	Frank Repsly		0	0	0	0	0	0	0	0.0000	0	0
1234	LaBiscuit Shenault		0	0	0	0	0	0	0	0.0000	0	0
76620	Lyssa Ireland Thomas		9	29	88	38	1	20	19	40.9900	1397	7262
RALPHREP	Ralph Repsly		0	0	0	0	0	0	0	0.0000	0	0
RYREP	Ryan Repsly		0	0	0	0	0	0	0	0.0000	0	0
RREP	Ryhanna Repsly		0	0	0	0	0	0	0	0.0000	0	0

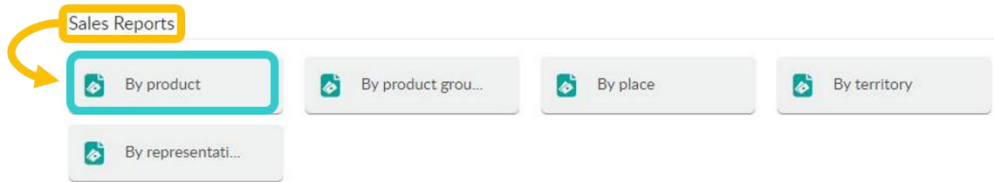
## Sales Reports

## By Product

- Click **Reports** > select **Overview**.

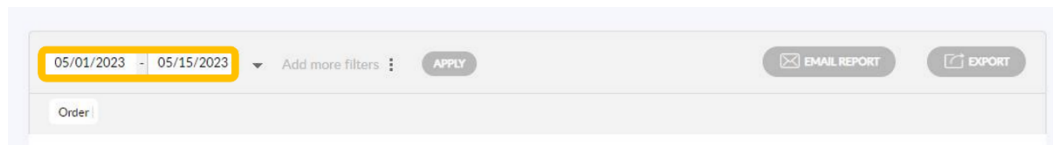
The screenshot shows the Repsly dashboard. On the left sidebar, the 'Reports' menu item is highlighted with a yellow box. A dropdown menu is open, showing 'Overview' as the selected option, also highlighted with a yellow box. Other options in the dropdown include 'Form reports', 'Insights Dashboards', and 'Time & Mileage'. The main content area shows a map of the United States and a 'Feed' section with filters for 'All field activities' and '05/09/2023'. At the bottom, there are three summary cards: 'Active reps: 0', 'Visits: 0', and 'Activities: 0'.

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

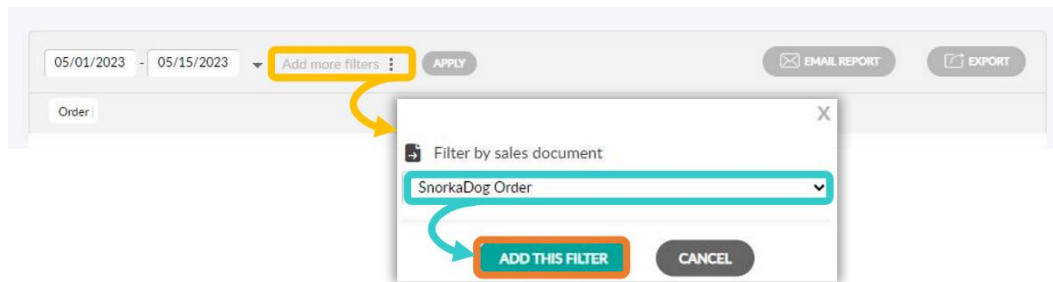


3. From this view, you can do the following:

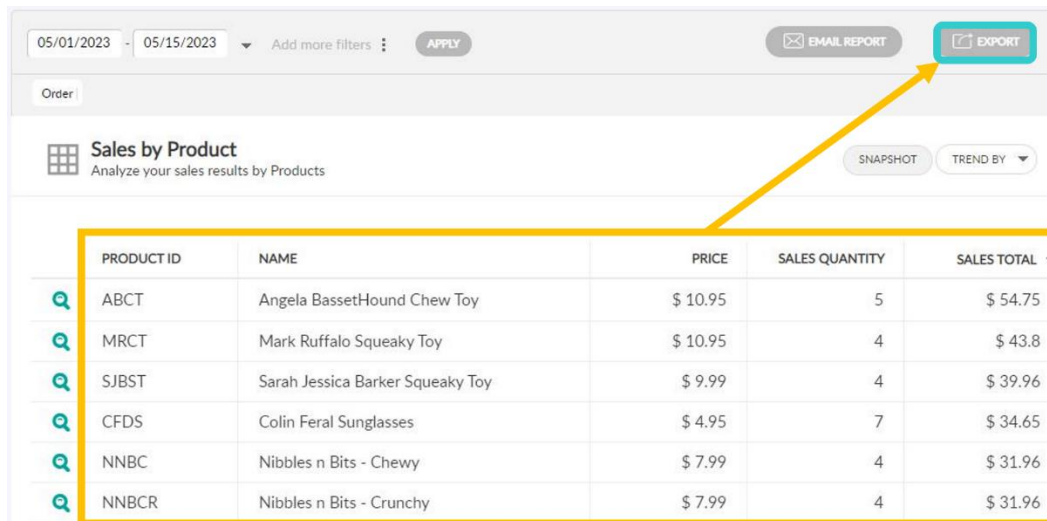
a. **Filter by date**



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.

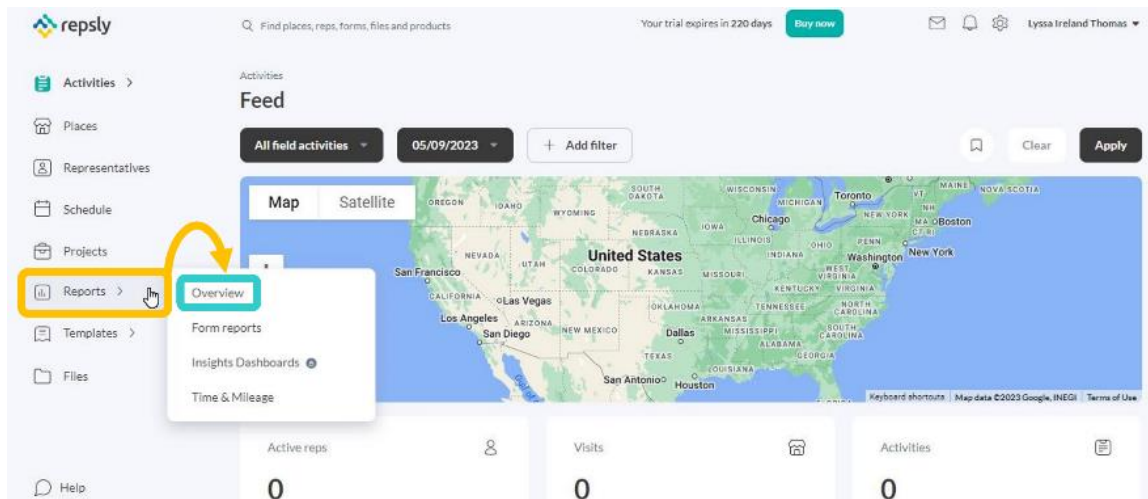


5. Your **exported data** can be shared or manipulated from here.

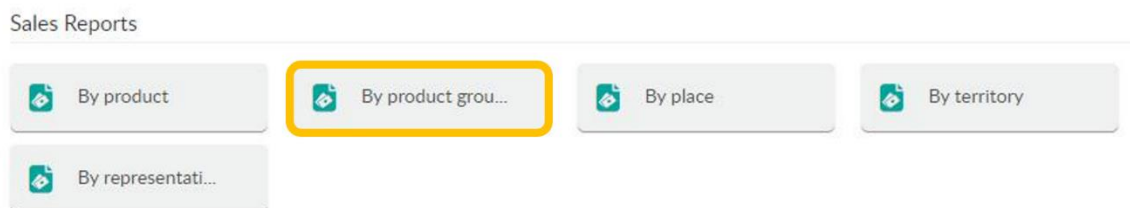
	A	B	C	D	E
1	ID	Name	Unit price	Quantity	Total
2	ABCT	Angela BassetHound Chew Toy	10.95	5	54.75
3	MRCT	Mark Ruffalo Squeaky Toy	10.95	4	43.8
4	SJBST	Sarah Jessica Barker Squeaky Toy	9.99	4	39.96
5	CFDS	Colin Feral Sunglasses	4.95	7	34.65
6	NNBC	Nibbles n Bits - Chewy	7.99	4	31.96
7	NNBCR	Nibbles n Bits - 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**.

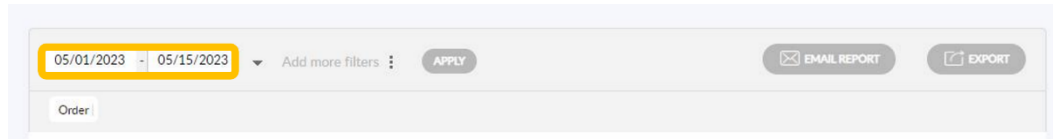


2. Under **Sales Reports** > select **By Product Group**.

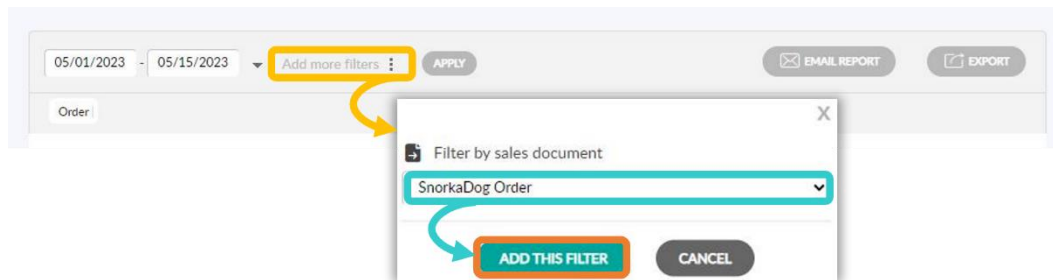


3. From this view, you can do the following:

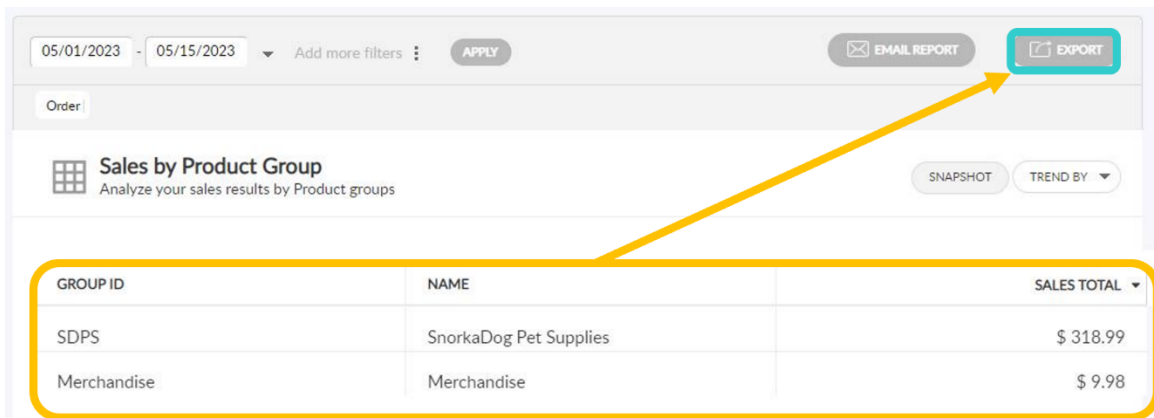
a. Filter by date



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.

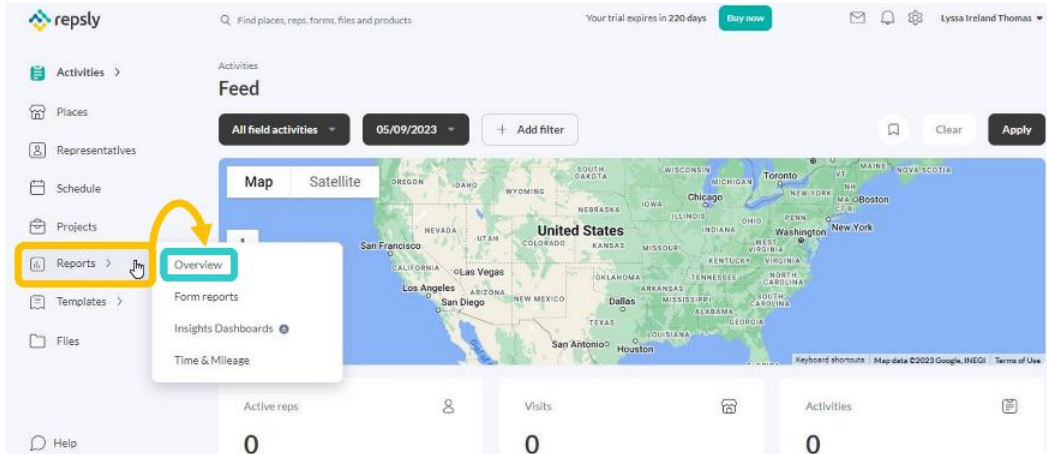


5. Your **exported data** can be shared or manipulated from here.

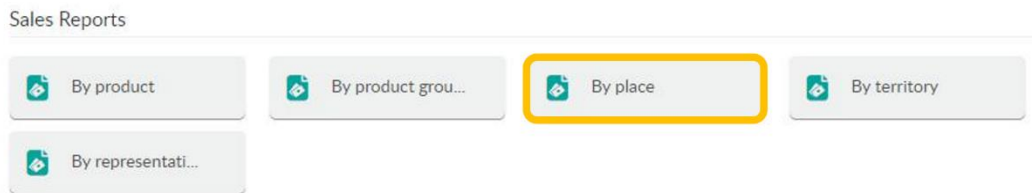
	A	B	C
1	ID	Name	Total
2	SDPS	SnorkaDog Pet Supplies	318.99
3	Merchandise	Merchandise	9.98

## By Place

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

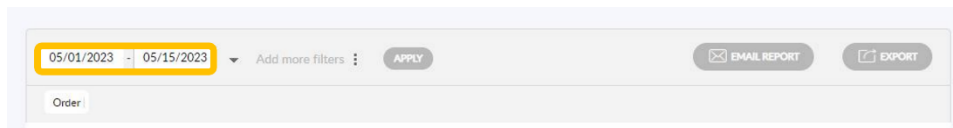


2. Under **Sales Reports** > select **By Place**.

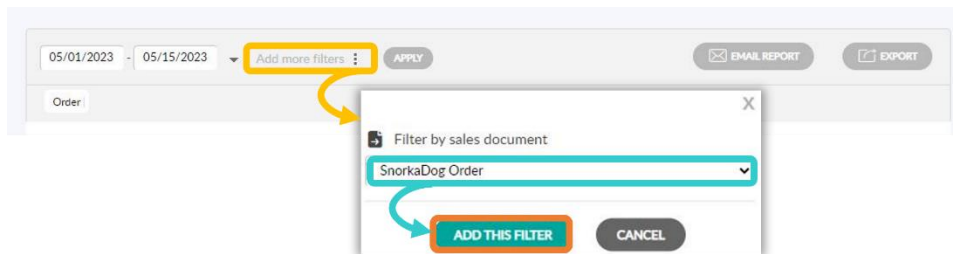


3. From this view, you can do the following:

a. **Filter by date**



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





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

PLACE ID	NAME	SALES TOTAL
12	Pet Supplies Plus	\$ 318.99
4	Publix Super Market	\$ 9.98

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

ID	Name	Street Address	ZIP	ZIP ext	City	State	Country	Total
12	Pet Supplies Plus	510 Blanding Blvd, Suite 50	32073		Jacksonville	Florida	United States	318.99
4	Publix Super Market	9518 Argyle Forest Blvd	32222		Jacksonville	Florida	United States	9.98

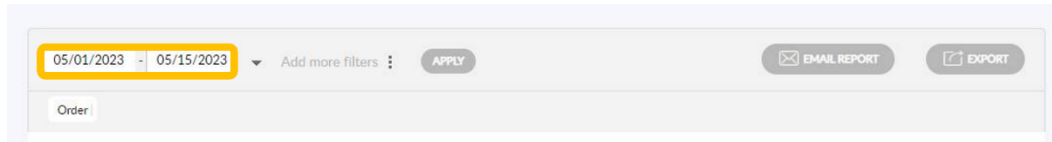
## By Territory

- Click **Reports** > select **Overview**.

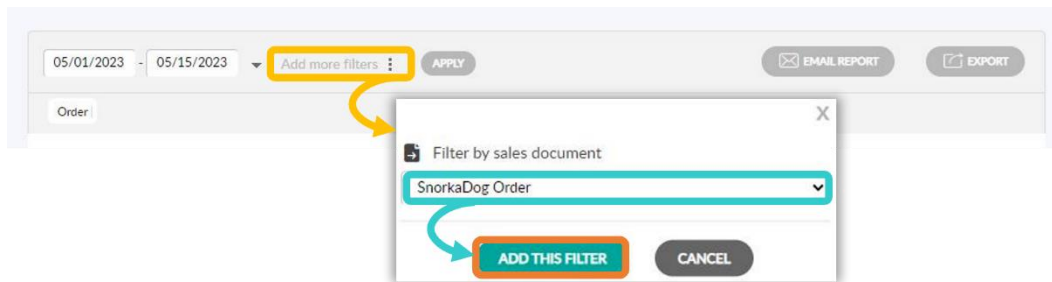
- Under **Sales Reports** > select **By Territory**.

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

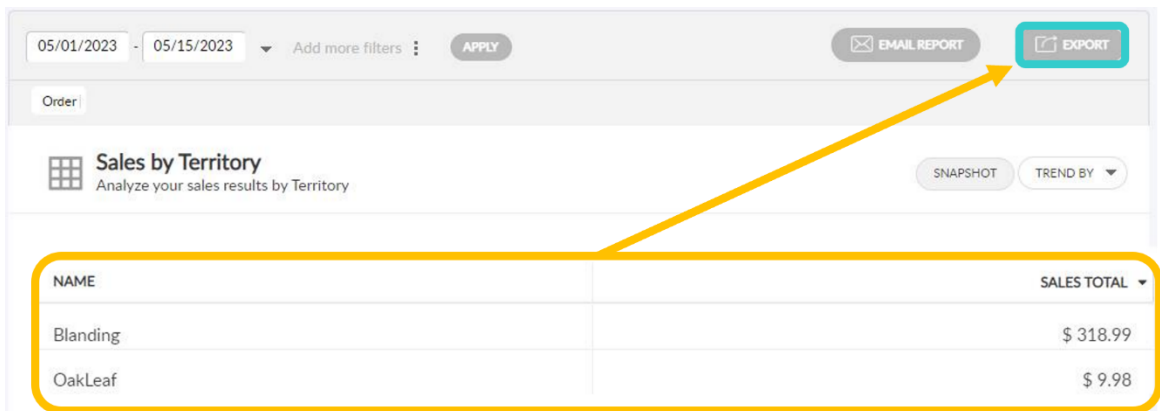
a. Filter by date



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.

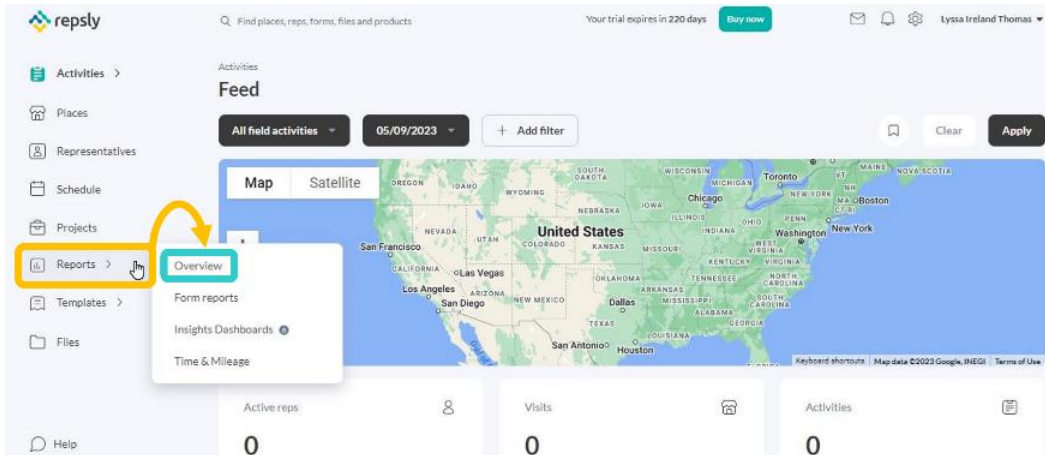


5. Your **exported data** can be shared or manipulated from here.

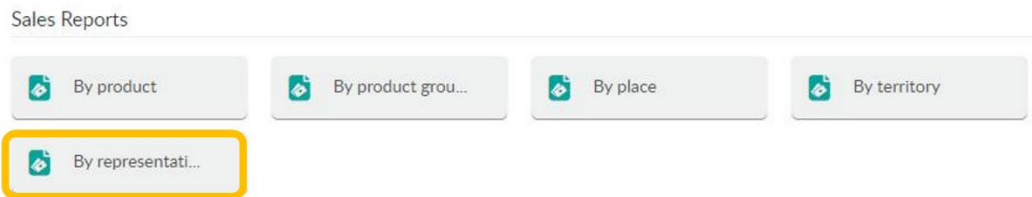
	A	B
1	Name	Total
2	Blanding	318.99
3	OakLeaf	9.98
4		

## By Representative

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

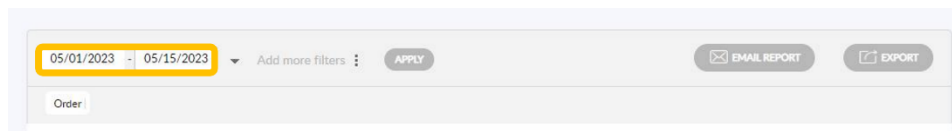


2. Under **Sales Reports** > select **By Representative**.

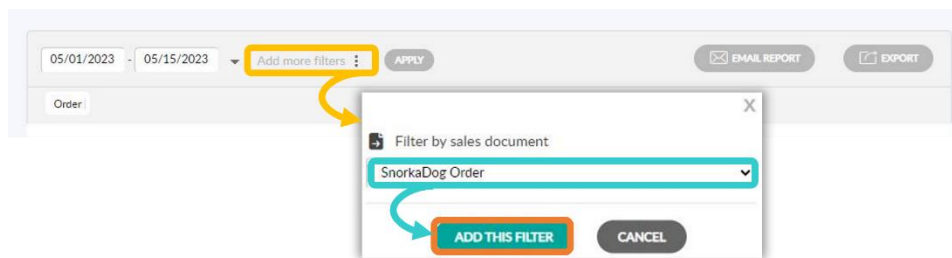


3. From this view, you can do the following:

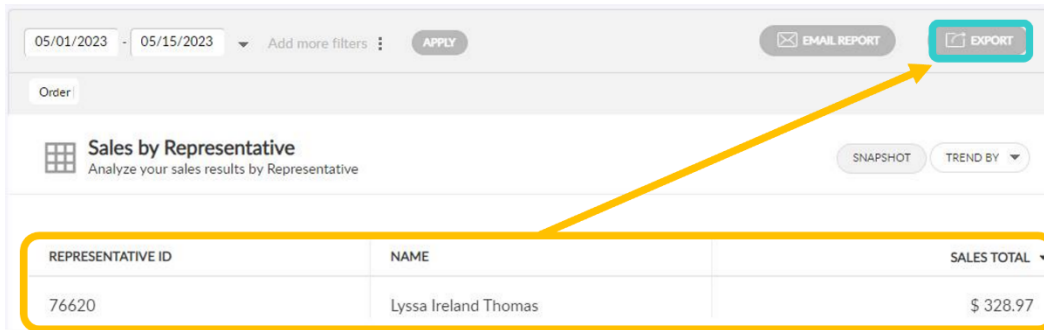
**a. Filter by date**



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



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



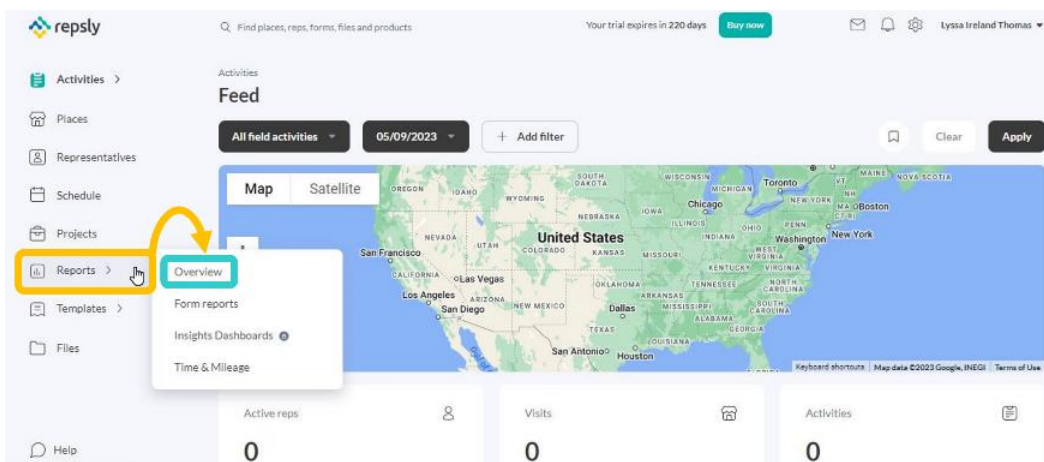
- Your **exported data** can be shared or manipulated from here.

	A	B	C
1	ID	Name	Total
2	76620	Lyssa Ireland Thomas	328.97

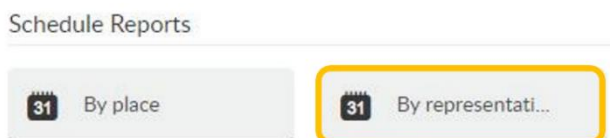
## Schedule Reports

### By Representative

- Click **Reports** > select **Overview**.

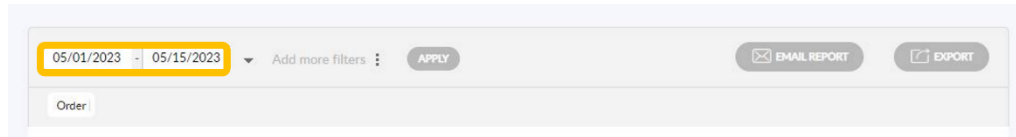


- Under **Schedule Reports** > select **By Representative**.

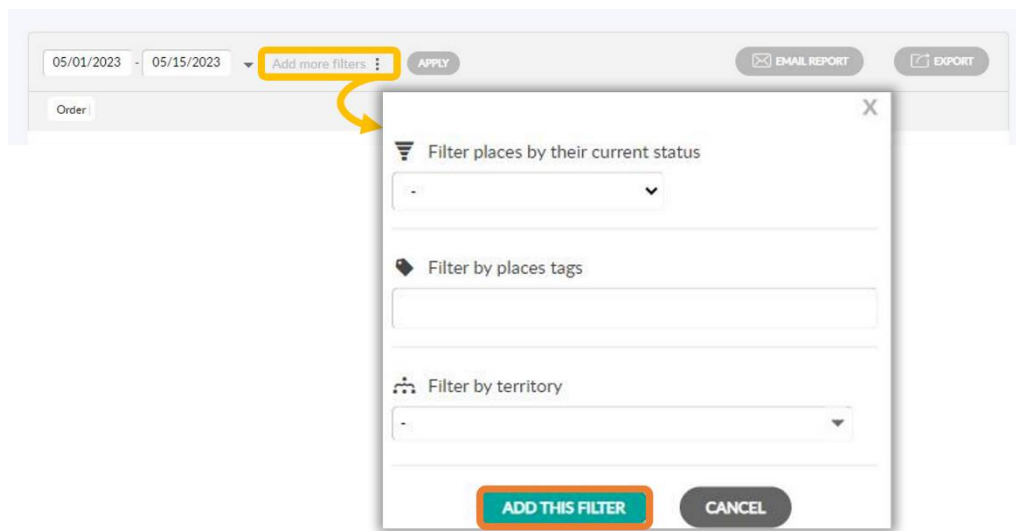


3. From this view, you can do the following:

**a. Filter by date**

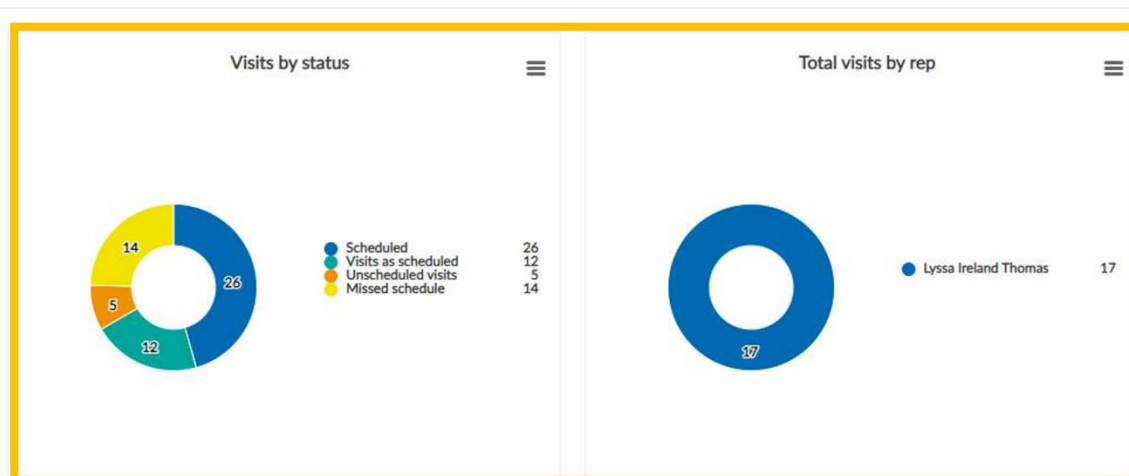


**b. Add more filters** > click the **three dots** (kebab menu) to open > select from the **filters** > click **Add This Filter**.



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

**Schedule Report by Reps**  
Visit summary report by Representatives



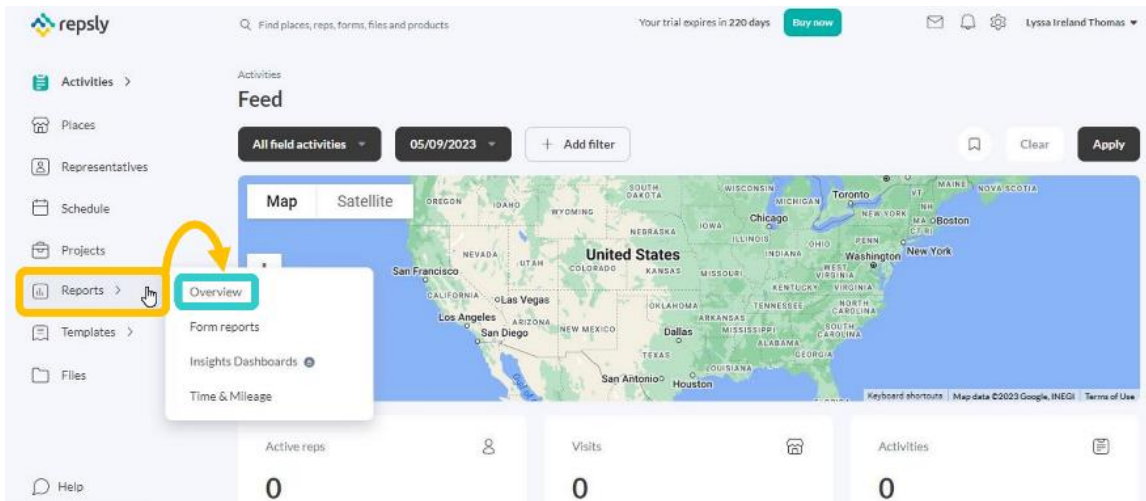
NAME	TOTAL VISITS	SCHEDULED	SCHEDULED VISITED	UNSCHEDULED VISITS	MISSED
Lyssa Ireland Th...	17	21	12	5	9
Dolly Barkon	0	2	0	0	2
LaBiscuit Shenault	0	1	0	0	1
Ryhanna Repsly	0	1	0	0	1
Fluffycorn Thom...	0	1	0	0	1

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

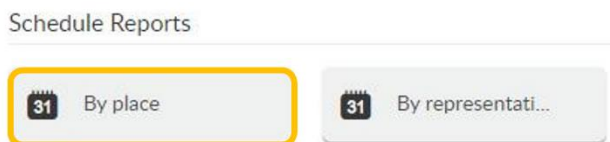
	A	B	C	D	E	F
1	Name	Total visits done	Scheduled	Visits as scheduled	Unplanned visits	Missed schedule
2	Lyssa Ireland Thomas	17	21	12	5	9
3	Dolly Barkon	0	2	0	0	2
4	LaBiscuit Shenault	0	1	0	0	1
5	Ryhanna Repsly	0	1	0	0	1
6	Fluffycorn Thomas	0	1	0	0	1

## By Place

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

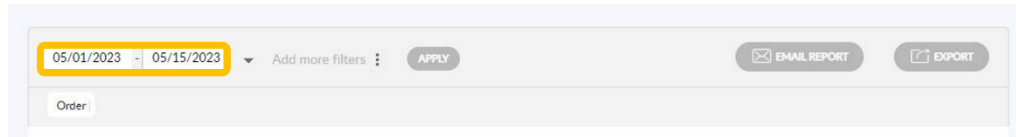


2. Under **Schedule Reports** > select **By Place**.

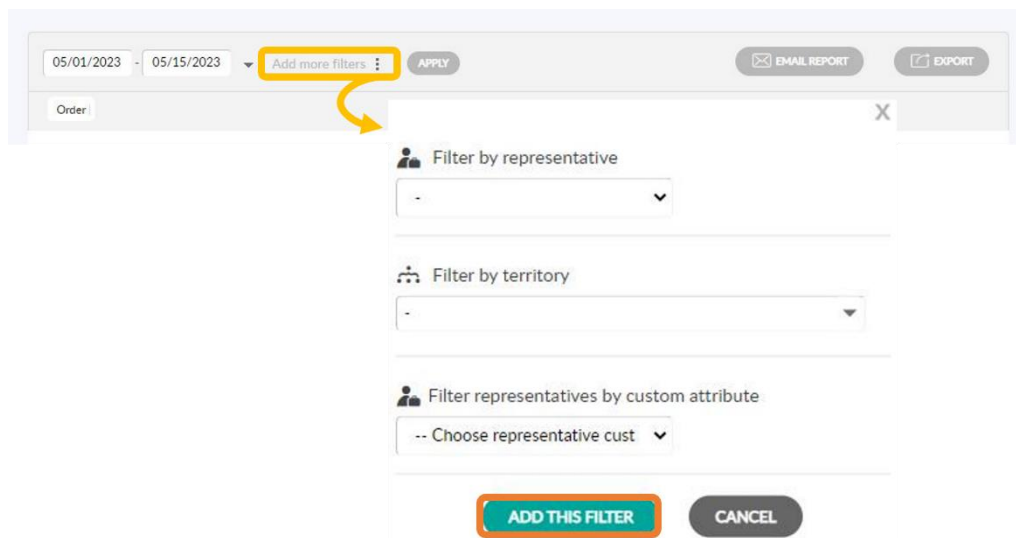


3. From this view, you can do the following:

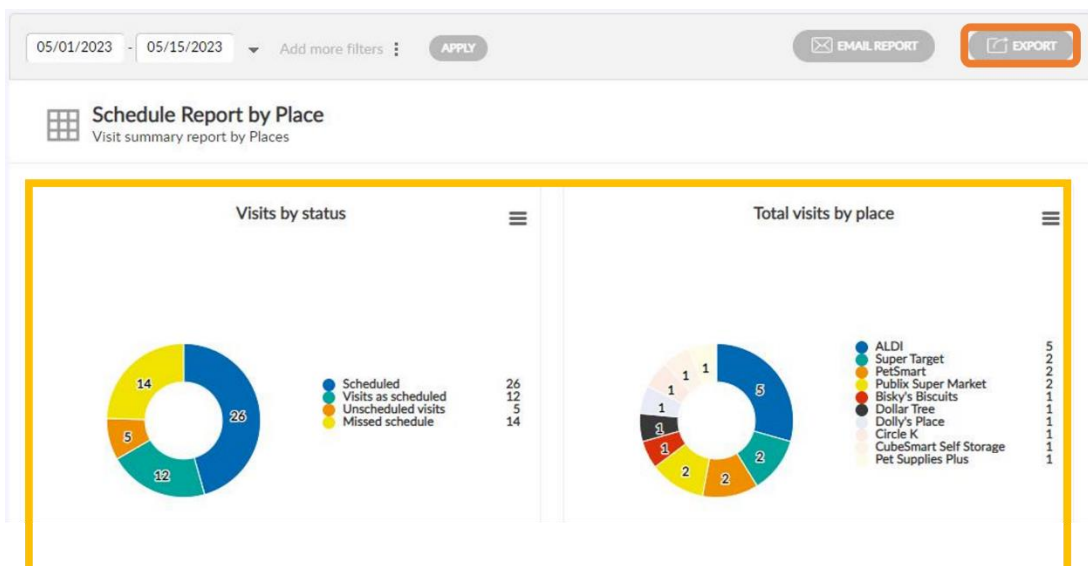
a. Filter by date



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.



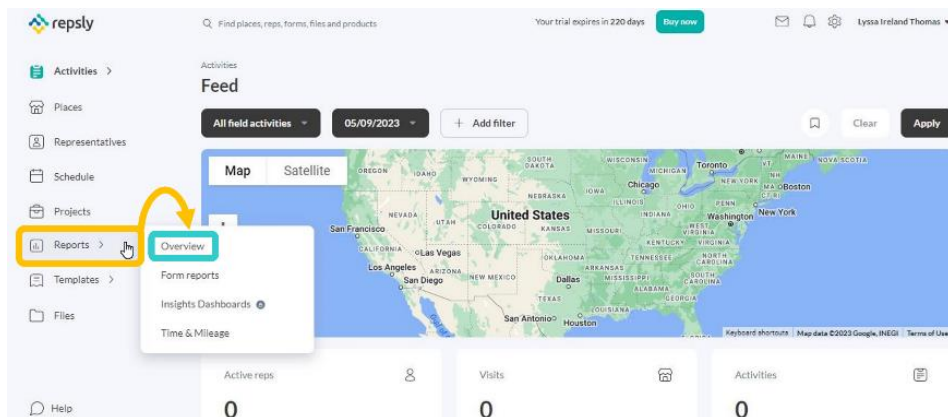
NAME	TOTAL VISITS	SCHEDULED	SCHEDULED VISITED	UNSCHEDULED VISITS	MISSED
ALDI	5	7	5	0	2
Super Target	2	6	2	0	4
PetSmart	2	3	2	0	1
ALDI	0	2	0	0	2
Bisky's Biscuits	1	1	0	1	1

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

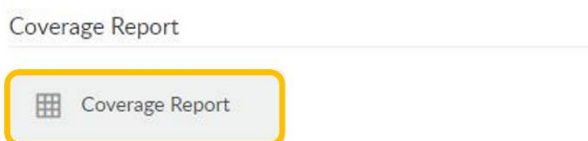
ID	Name	Total visits done	Scheduled	Visits as scheduled	Unplanned visits	Missed schedule
2	ALDI	5	7	5	0	2
3	Super Target	2	6	2	0	4
4	PetSmart	2	3	2	0	1
5	16 ALDI	0	2	0	0	2
6	26147203 Bisky's Biscuits	1	1	0	1	1
7	14 Dollar Tree	1	2	1	0	1
8	22 Dolly's Place	1	0	0	1	0
9	26147260 Circle K	1	0	0	1	0
10	26147275 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**.



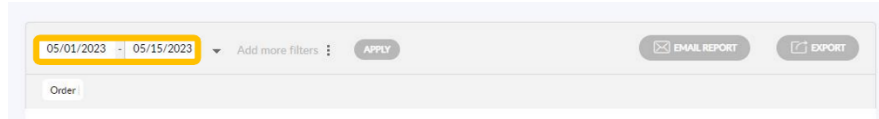
2. Under **Coverage Report** > select **Coverage Report**.



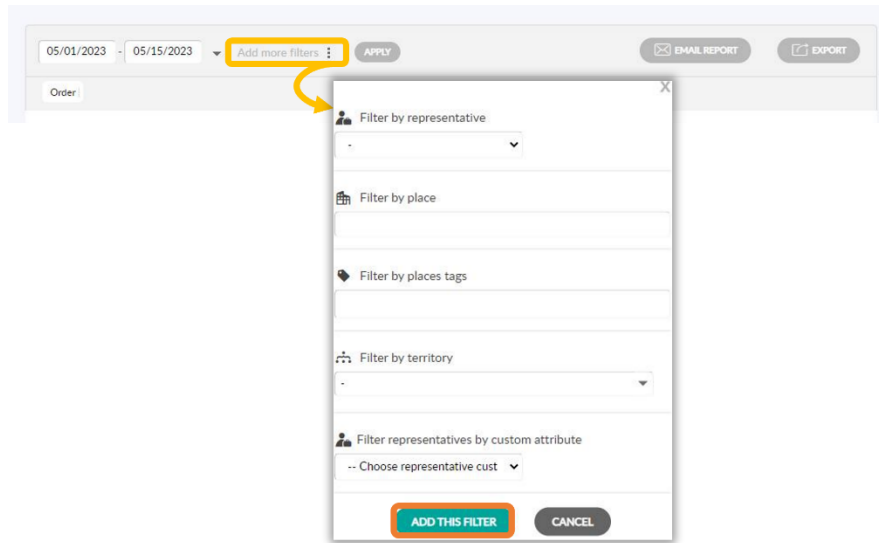


3. From this view, you can do the following:

**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.

	Total places	Places visited	Coverage (%)	Time traveling	Time at place	Link to coverage lists
Whole company	32	0	0 %	-	-	Places visited Places not visited
<b>Territories</b>						
Orange Park	-	0	-	-	-	Places visited Places not visited
Blanding	8	0	0 %	-	-	Places visited Places not visited
OakLeaf	10	0	0 %	-	-	Places visited
<b>Representatives</b>						
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			C	D	E
1	Total places	Places visited	Coverage percentage	Time traveling	Time at place
2	32	0	0%	-	-

Territories			C	D	E	F
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%	-	-

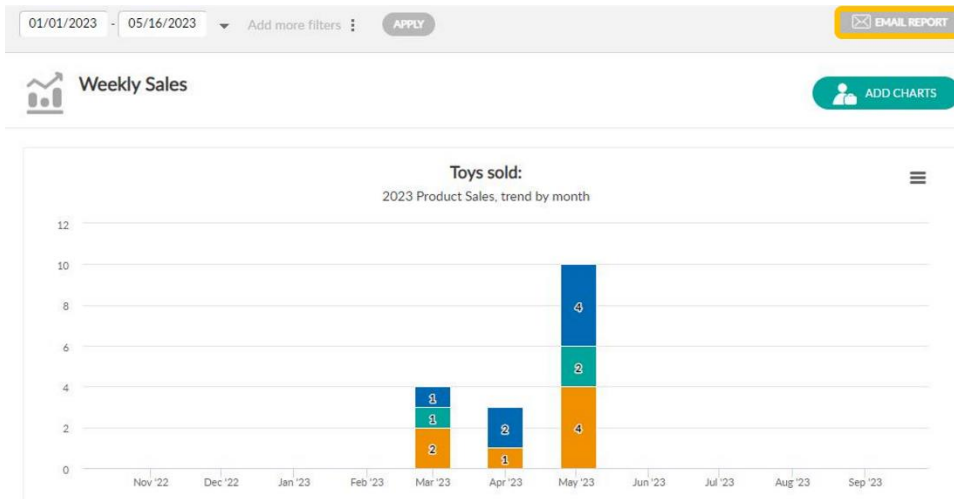
  

Representatives			C	D	E	F
1	Name	Total places	Places visited	Coverage percentage	Time traveling	Time at place
2	Lyssa Ireland Thomas	25	0	0%	-	-
3	Dolly Barkon	2	0	0%	-	-
4	LaBiscuit Shenault	2	0	0%	-	-
5	Fluffycorn Thomas	2	0	0%	-	-
6	Frank Repsly	0	0	0%	-	-
7	Ryan Repsly	0	0	0%	-	-
8	Ryhanna Repsly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

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.

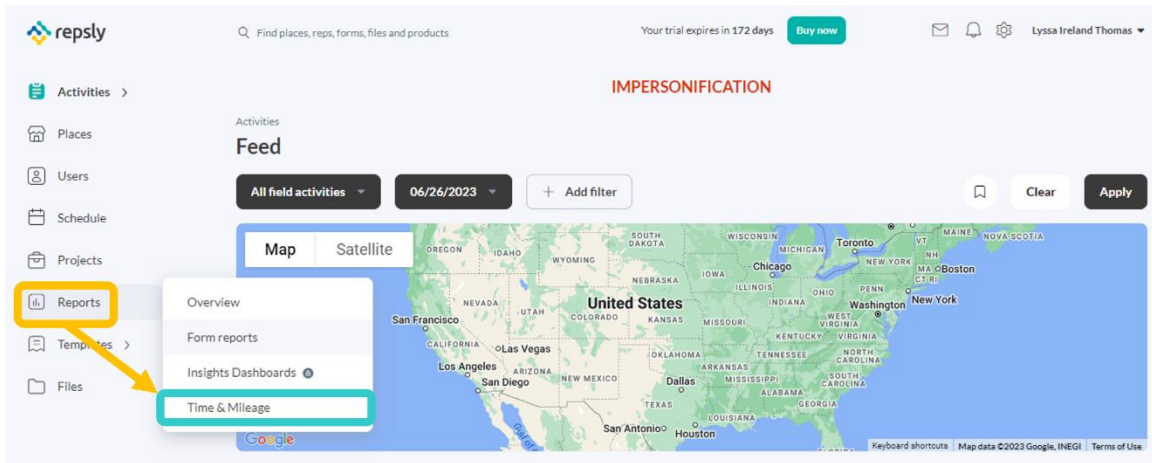


1. Complete the following information:
  - a. **Send Frequency**
  - b. **Starting Date**
  - c. **Time of Date**
  - d. **Recipient** (report can only be sent to Repsly users)
- vi. Click **Save**.

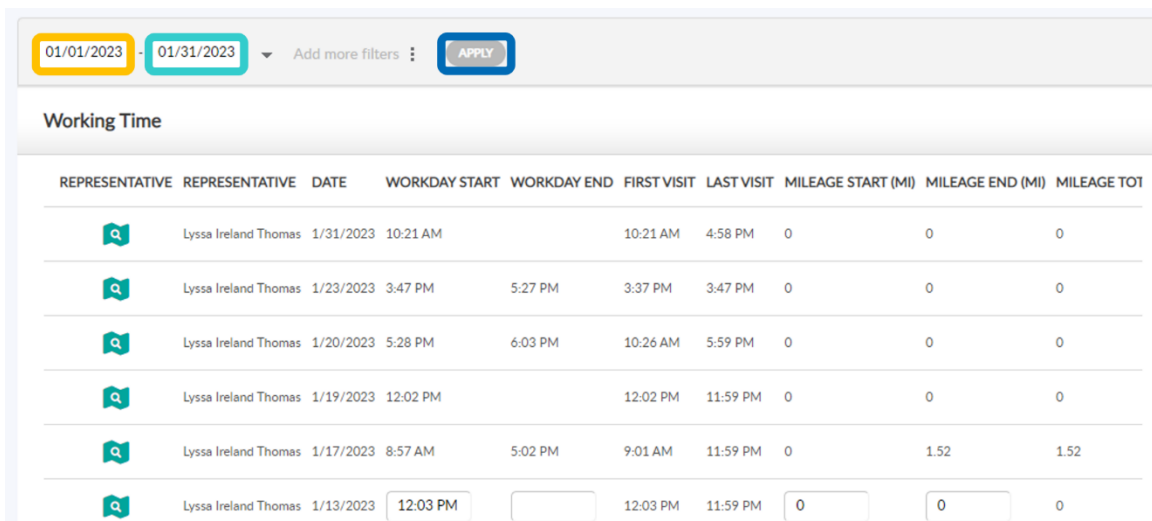
2. The sales report will appear in your email on the date and time specified.

# Time & Mileage Report

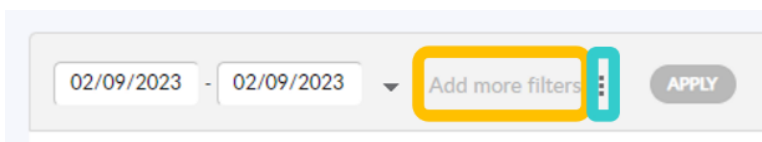
1. Click **Reports** > select **Time & Mileage**.



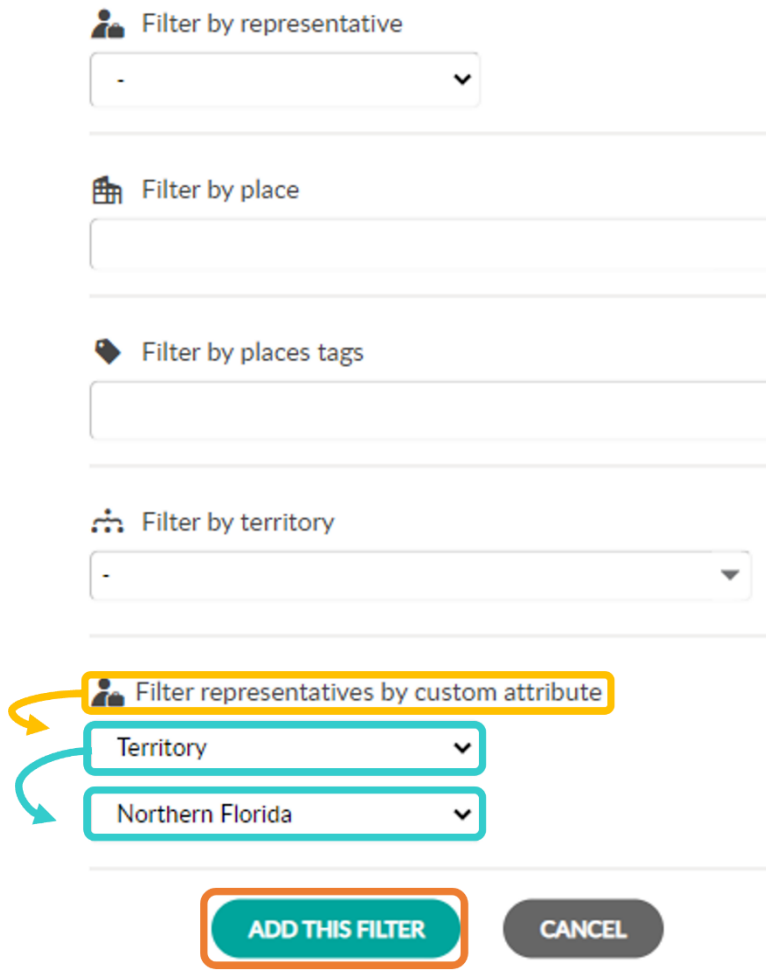
2. Under the filters, select the **Start Date** and **End Date** of the period you want to review > click **Apply**.



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**.



Filter by representative

Filter by place

Filter by places tags

Filter by territory

Filter representatives by custom attribute

Territory

Northern Florida

ADD THIS FILTER

CANCEL

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)

01/01/2023 - 01/31/2023 Add more filters APPLY

**Working Time**

REPRESENTATIVE	REPRESENTATIVE	DATE	WORKDAY START	WORKDAY END	FIRST VISIT	LAST VISIT	MILEAGE START (MI)	MILEAGE END (MI)	MILEAGE TOT
	Lyssa Ireland Thomas	1/31/2023	10:21 AM		10:21 AM	4:58 PM	0	0	0
	Lyssa Ireland Thomas	1/23/2023	3:47 PM	5:27 PM	3:37 PM	3:47 PM	0	0	0
	Lyssa Ireland Thomas	1/20/2023	5:28 PM	6:03 PM	10:26 AM	5:59 PM	0	0	0
	Lyssa Ireland Thomas	1/19/2023	12:02 PM		12:02 PM	11:59 PM	0	0	0
	Lyssa Ireland Thomas	1/17/2023	8:57 AM	5:02 PM	9:01 AM	11:59 PM	0	1.52	1.52
	Lyssa Ireland Thomas	1/13/2023	12:03 PM		12:03 PM	11:59 PM	0	0	0

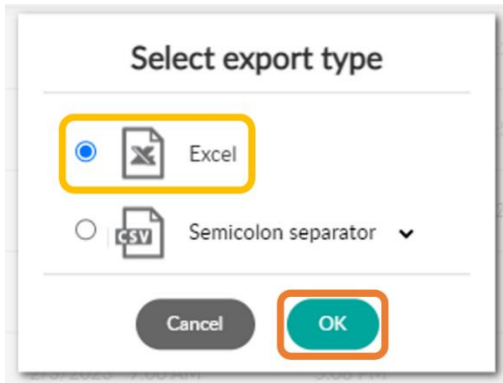
## Exporting the Time and Mileage Report

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

	Lyssa Ireland Thomas	1/23/2023	3:47 PM	5:27 PM	3:37 PM	3:47 PM	0	0	0
	Lyssa Ireland Thomas	1/20/2023	5:28 PM	6:03 PM	10:26 AM	5:59 PM	0	0	0
	Lyssa Ireland Thomas	1/19/2023	12:02 PM		12:02 PM	11:59 PM	0	0	0
	Lyssa Ireland Thomas	1/17/2023	8:57 AM	5:02 PM	9:01 AM	11:59 PM	0	1.52	1.52
	Lyssa Ireland Thomas	1/13/2023	12:03 PM		12:03 PM	11:59 PM	0	0	0
	Lyssa Ireland Thomas	1/12/2023	2:55 PM	11:13 PM	2:56 PM	4:01 PM	0	0	0
	Lyssa Ireland Thomas	1/4/2023	2:47 PM		2:51 PM	2:52 PM	0	0	0
	Lyssa Ireland Thomas	1/3/2023	12:30 PM	5:06 PM			0	0	0
									1.52

EXPORT

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

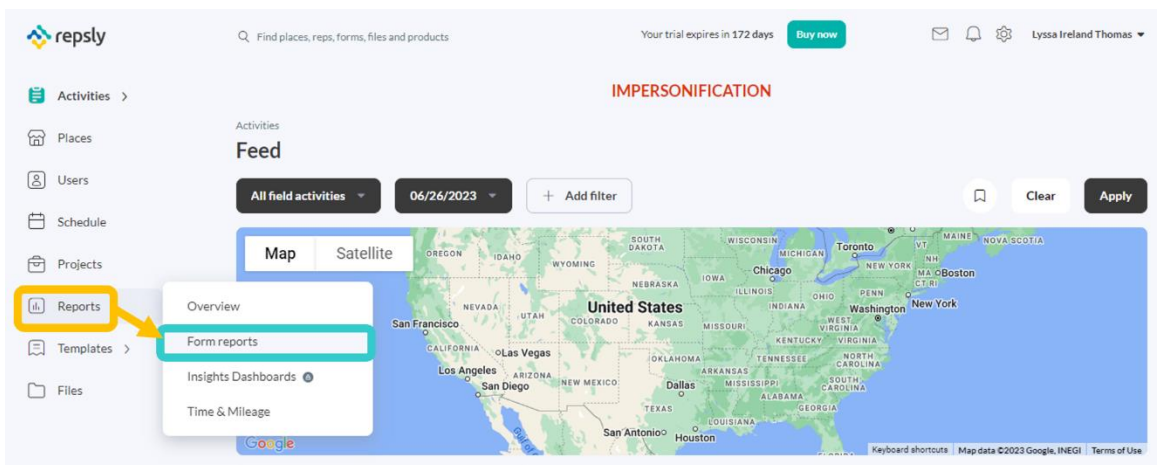


3. Open and save the report.

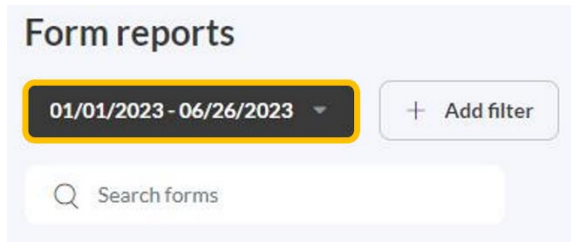
Date	Begin date	End date	Total	Mileage	Mileage	Mileage	Remote v	No of visit	Min of vis	Max of vis	Min/Max	Represent	Represent	Time	Spur	Time in	Pause	tot	Working	Time at	gl	Time	Rem	Time
1/11/2023	1/11/2023		5	0.00	0.00	0.00	5	1	1/11/2023	1/11/2023	796	79620	Lyssa Ireland	5	5	0.00	4.36	0.00	0.00					
1/23/2023	1/23/2023	1/23/2023	100	0.00	0.00	0.00	5	1	1/23/2023	1/23/2023	5	79620	Lyssa Ireland	5	5	1.40	0.09	0.00	1.31					
1/20/2023	1/20/2023	1/20/2023	34	0.00	0.00	0.00	5	7	1/20/2023	1/20/2023	463	79620	Lyssa Ireland	40	5	0.34	0.40	0.00	0.00					
1/19/2023	1/19/2023		5	0.00	0.00	0.00	5	1	1/19/2023	1/19/2023	716	79620	Lyssa Ireland	716	5	0.00	11.56	0.00	0.00					
1/17/2023	1/17/2023	1/17/2023	484	0.00	1.52	1.52	5	2	1/17/2023	1/17/2023	597	79620	Lyssa Ireland	472	12	6.04	7.52	0.00	0.12					
1/13/2023	1/13/2023		5	0.00	0.00	0.00	5	1	1/13/2023	1/13/2023	715	79620	Lyssa Ireland	607	5	0.00	19.07	0.00	0.00					
1/12/2023	1/12/2023	1/12/2023	917	0.00	0.00	0.00	5	2	1/12/2023	1/12/2023	64	79620	Lyssa Ireland	21	464	8.17	0.31	0.00	7.44					
1/4/2023	1/4/2023		1	0.00	0.00	0.00	5	1	1/4/2023	1/4/2023	1	79620	Lyssa Ireland	1	5	0.00	0.01	0.00	0.00					
1/1/2023	1/1/2023	11/3/2023	739	0.00	0.00	0.00	5				0	79620	Lyssa Ireland	0	5	4.36	0.00	0.00	0.00					

## Form Reports

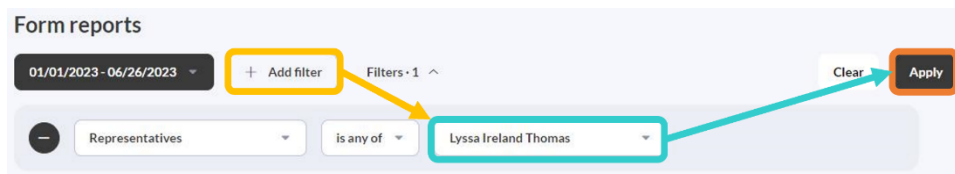
1. Click **Reports** > select **Forms Reports**.



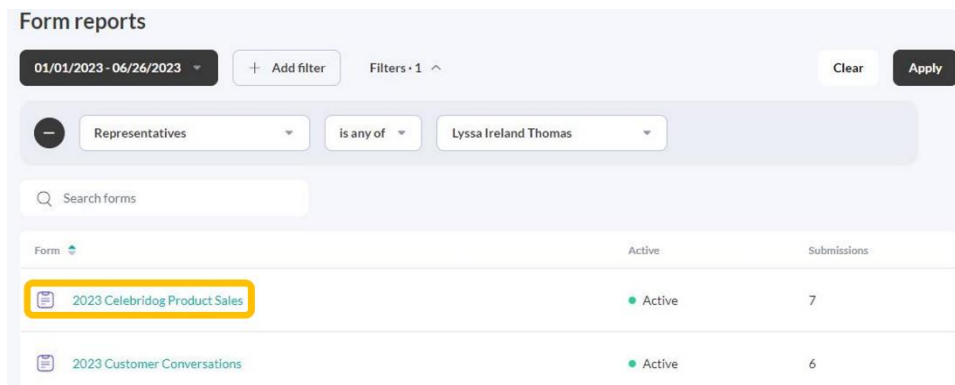
2. Under the filters, select the **Start Date** and **End Date** of the period you want to review.



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



4. Select the **form**.



5. You can now see the results for that form using the filters selected.

