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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:

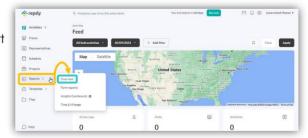
Dashboard Report
 Coverage Report

Report

Form Report

Time & Mileage

- Summary Report
- Rankings 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

 Q Search places	01/01/2023 05	/10/2023	Add more filters		View as: Rank	ings 👻
PLACE	VISITS	FORMS	PHOTOS	NOTES	SALES DOCUMENTS	RETAI
Q ALDI	15	8	24	0	i ^{fa}	î
Q ALDI	1	0	0	0	9	
Q Big Lots - SW Jacksonville	2	1	0	0	0	
(C						•

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:

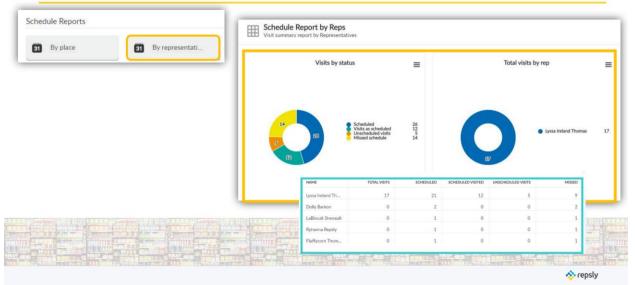
- Sales by Product
- Sales by Product Group
- Sales by Place
- Sales by Territory
- Sales by Rep

Order					
	Sales by Produ Analyze your sales re			SNAPSHOT	TREND BY Y
	PRODUCTID	NAME	PRICE	SALES QUANTITY	SALES TOTAL
۹	ABCT	Angela BassetHound Chew Toy	\$ 10.95	5	\$ 54.75
۹	MRCT	Mark Ruffalo Squeaky Toy	\$ 10.95	4	\$ 43.8
Q	SJBST	Sarah Jessica Barker Squeaky Toy	\$ 9.99	4	\$ 39.96
Q	CFDS	Colin Feral Sunglasses	\$ 4.95	7	\$ 34.65
۹	NNBC	Nibbles n Bits - Chewy	\$ 7.99	4	\$ 31.96
_	NNBCR	Nibbles n Bits - Crunchy	\$ 7.99	4	\$ 31.96

🚸 repsly

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**.

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Coverage Report

Coverage Report

Coverage Report		Total places (?)	Places visited (?)	Coverage (%)	Time traveling (?)	Time at place (?)	Link to coverage ③
	Whole company	36	0	0 %			Places not visited
	Territories						
	Orange Park	(a)	0	12	23	2	Baten visites Baten von sinder
	Blanding	9	0	0 %	+8		Places not visited
	OakLeaf	10	o	0 %	27	5	Biomaintea .
	Representatives						
	Lyssa Ireland Thomas	29	0	0 %		5	Places not visited
	Dolly Barkon	2	0	0 %	-	2	Places not visited
	LaBiscuit Shenault	2	0	0 %			Places not visited

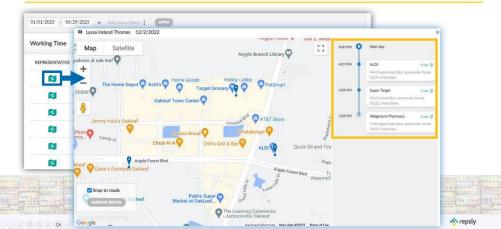
Analyzes how well your team is covering your territory.

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

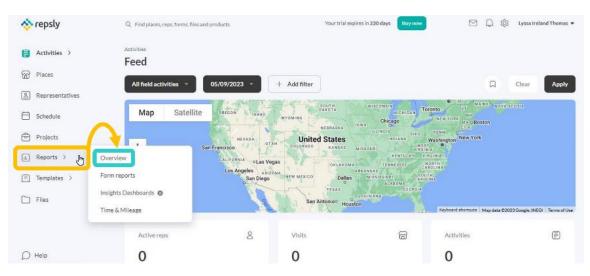
2023 Celebridog Pro-	Hand Hilter Filters • 1 ×		ک Export Clear Apply	
Summary Submissions				
Was the Doggie Selfie Stick on th	te shelf?	Did you sell a new product?		
	• Yes 6 • No 1 • None 0	435	• Yes 4 • No 3 • None 0	
6 8 0 6 9 9 9				🚸 repsly

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.

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.

Ξ



• 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

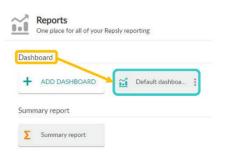
Different reports meet a variety of needs. Let's review the various reports to see what fits your needs best.

Dashboard

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

🔷 repsly	Q Find places, reps, forms, files an	nd products Y	our trial expires in 220 days Bay now	🖂 💭 🏟 Lyssalm	eland Thomas 💌
Activities >	Activities Feed				
Places	All field activities	05/09/2023 - + Add filter		□ Clear	Apply
8 Representatives					- Contraction of the second
Schedule	Map Satellite	OREGON IDANO WYOMING	TH WISCONSIN MICHIGAN TO LOWA Chicago	NEW YORK MA DBoston	
		ALC: NOT	RASKA	CT RI	
Projects		NEVADA United S	tates INDIANA	Washington New York	
_	S Overview	NEVADA UTAM COLORADO	LLINGIS OHIO INDIANA KANSAS MISSOLAI (1930) KENTLOKY VII	Very Vork	
th Reports → 🐌		NEVADA UTAM COLORADO	LLINGIS OHIO INDIANA KANSAS MISSOLAI (1930) KENTLOKY VII	VENN C Washington New York	
⊪ Reports > ₽	Overview	NEVAOL am Francisco OLUEORINA OLAS Vegas Los Angeles Anizona Dan Deigo Hew MEXICO	ILLINOS ONIO IDINOS ALARDAS UISSOLRI AUTORI ALARDAS TEMESES Dallas ISSISTERI CON ALARDAS CEORGA	VENN C Washington New York	
ile_ Reports > ♪	Overview Form reports	NEVAOL am Francisco OLUEORINA OLAS Vegas Los Angeles Anizona Dan Deigo Hew MEXICO	ILLING ONIO IDIAN KANSAS MISSOURI VIEN ARANDAS ORANDAS Dallas Status Dallas Catadas Catadas Catadas	Stan o Washington New York	EGI Terms of Use
(ii. Reports > 🔥	Overview Form reports Insights Dashboards	NEVAOL am Francisco OLUEORINA OLAS Vegas Los Angeles Anizona Dan Deigo Hew MEXICO		DEEN O Washington, New York	EGI Terms of Use

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





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

a. Filter by date

Add more filters : And More filt	ADD CHARTS
This is a custom Dashboard	
What aisle is the product in?	Where is the product located on the shelf? Merchandising and Competitor Insight Report, snapshot
20	25
15	2
13	15
10 9.5	
	1
	0.5
	0

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

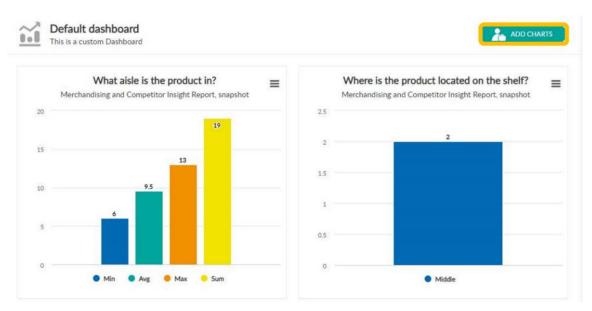
and the second second second	dashboard stom Dashboard	6			x	add charts
	What aisle is th	and the second second		representative 🗸		ated on the shelf?
Merchar 20	ndising and Competito		Filter by	place	ar.	Insight Report, snapshot
15		1	9			
		13	Filter by	places tags		
10	6		🙃 Filter by 1	territory		
5					-	



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.

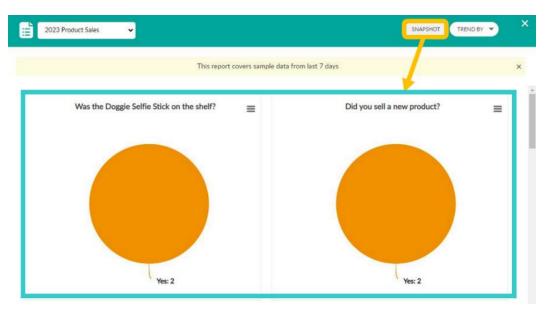




a. Select the form that contains the question you want to build a chart.

	2023 Customer Conversatie 🐱		SNAPSHOT TREN	о ву 👻 🗙
-	2023 Customer Conversations 2023 Meeting Notes			
-	2023 Product Sales			
	2023 PIOUCE Sales - WOPT 2023 Specific Photos Competitive Activity_LIT Merchandising and Competitor Insight Report_LIT	This report covers sample data fr	om last 7 days	×
	Merchandising Store Visit Out of Stock_UT Sampling Event Recap Store Visit: Demo	Ξ	Take a picture with the customer	=
	No data to display		No data to display	

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





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



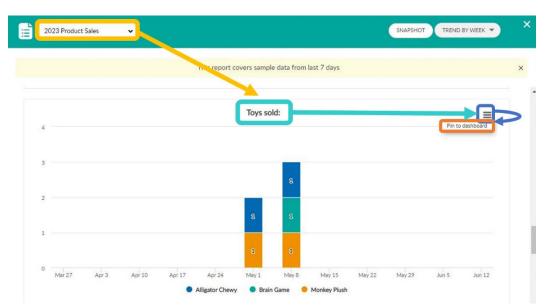
d. With the correct form selected, scroll down until you see the question you want to add to the dashboard > click the Chart
 Context Menu (hamburger menu) > and click Pin to Dashboard.



i. Snapshot example:



ii. Trend by Week example



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

1/01/2022 - 12/31/2023 - Add more filters : APPLY	
Default dashboard This is a custom Dashboard	ADD CHARTS
What aisle is the product in?	Where is the product located on the shelf? Merchandising and Competitor Insight Report, snapshot
20	25
15	2 2
13	15
10 9.5	1
5	0.5

- 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**.

🔷 repsly	$Q_{\rm c}$. Find places, reps, forms, files and ${\rm p}$	products Your trial expires in 220 days Bay now	V 💭 🔅 Lyssa Ireland Thomas
Activities >	Activities		
Places	All field activities	05/09/2023 - + Add filter	Clear Apply
8 Representatives			
Schedule	Map Satellite		Toronto VT WAINE NOVA SCOTIA
builedule		WYOMING Chicago	MAN YORK MA OBoston
		NEVADA UTAH UDARAS OHIO NAVESAS NESSURE OHIO	Vice Nork VA oboston Cran Washington New York
Projects		NEVADA United States Intrin Colocado Onico one NEVADA United States Intrin Colocado Intrin Colocado Intrin Colocado DALIFORMA OLAS Vegas OKLANDAA TENESTER Intrin Colocado	VENIL CT II Washington New York Fith II Shua
Projects		NEVADA UTAH United States Colorado NUMAN United States NUMAN NUMAN UNITED NUMAN NUMAN UNITED NUMAN NUMAN UNITED NUMAN NUMAN UNITED NUMAN NUMAN UNITED NUMAN NUMAN UNITED NUMAN UNITED NUMAN <th< td=""><td>Utuni Crui Washington Una V Vancine Monina Outine Outine Outine</td></th<>	Utuni Crui Washington Una V Vancine Monina Outine Outine Outine
Projects	Overview.	NEVADA NEVADA UTAH UTAH UTAH UTAH Colorado KANESA San Digo New MEXICO San Digo New MEXICO Colorado KANESA MISOLEI OKLAHOWA KANESA MISOLEI OKLAHOWA TENNEGEE ARCARSAS Dallas MISSISSEPI CALGAMA CONSTRAINT CALGAMA CONSTRAINT CALGAMA CONSTRAINT CALGAMA CONSTRAINT CALGAMA C	Visuna Washington Washina Cabolina Ostroa
Projects	Overview Form reports Insights Dashboards	NEVADA NEVADA UTAH UTAH UTAH UTAH Colorado KANESA San Digo New MEXICO San Digo New MEXICO Colorado KANESA MISOLEI OKLAHOWA KANESA MISOLEI OKLAHOWA TENNEGEE ARCARSAS Dallas MISSISSEPI CALGAMA CONSTRAINT CALGAMA CONSTRAINT CALGAMA CONSTRAINT CALGAMA CONSTRAINT CALGAMA C	Utuni Crui Washington Una V Vancine Monina Outine Outine Outine

2. Under Dashboard > select + Add Dashboard.





- 7. Enter the following information and click Create Dashboard:
 - c. Dashboard Title
 - d. Dashboard Description

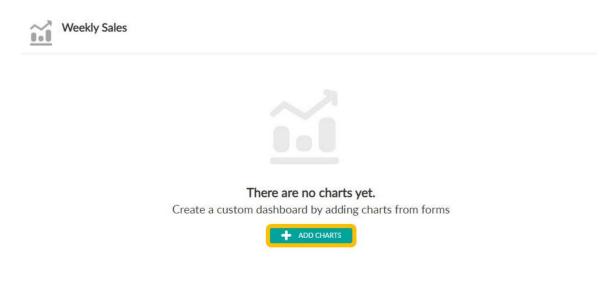
Create custom dashboard

Dashboard title	
Weekly Sales	
Dashboard description	
	CREATE DASHBOARD

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



9. Click + Add Charts.

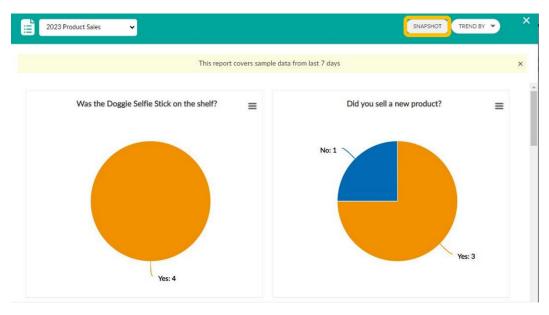




4. Select the form that contains the question you want to build a chart.

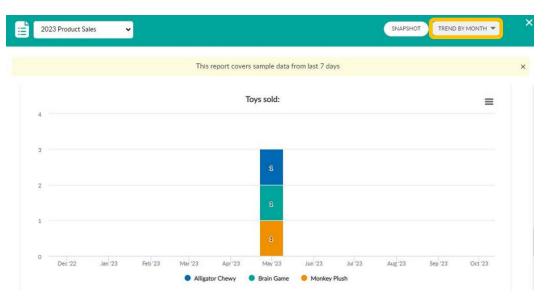
2023 Customer Conversations 2023 Customer Conversations 2023 Meeting Notes		SNAPSHOT TREN	ID BY
2023 Product Sales 2023 Froduct Sales 2023 Specific Photos	This report covers sample data fr	rom last 7 days	;
Follow Up Ac	tions	Take a picture with the customer	≡
No data to di	splay	No data to display	

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

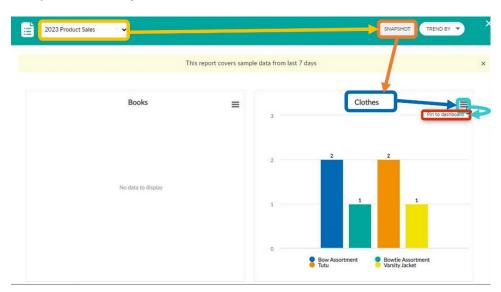




b. You can trend the charts by the following time ranges (Day, Week, or Month).



- 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:



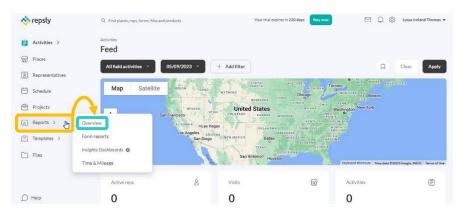
 The following dashboard will result from our actions. You can set up an <u>Email Report</u> if you want this information delivered to your email on a set schedule.





Summary Report

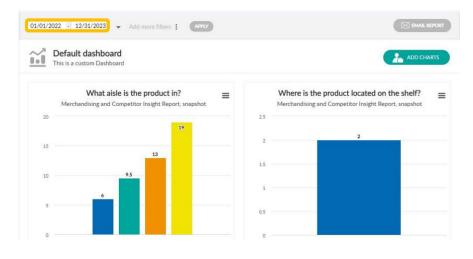
1. Click **Reports** > select **Overview**.



2. Under Summary Report > select Summary Report.

Reports One place for all of your R	epsly reporting	
ashboard		
+ ADD DASHBOARD	Default dashboa	0.00
ummary report		
Σ Summary report		

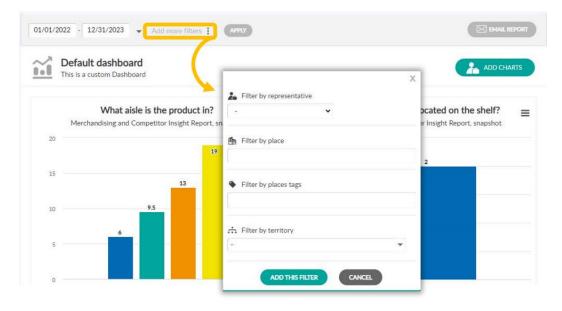
- 3. From this view, you can do the following:
 - a. Filter by date



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



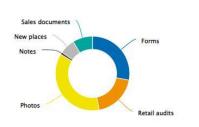
- 4. This screen gives you summary information about your Repsly Usage. This is a great place to grab screenshots for presentations.
 - a. Reps, Place Visits, and Activities





c. Activities by Type

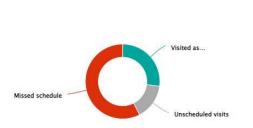
Activities by Type	
Forms	29
🔀 Retail audits	20
Photos	38
Notes	1
New places	7
T Status changes	0
Sales documents	9



d. Schedule Planning

Schedule planning

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



e. Forms

Forms

	Out of Stock_LIT	1	(E)	Σ
			7	(i=
	Merchandising and Competitor Insig	ht Report_l	JT	Σ
	2023 Specific Photos	2		Σ
ľ	2023 Product Sales	11		Σ
ľ	2023 Meeting Notes	1		Σ
Ē	2023 Customer Conversations	4	(E)	Σ





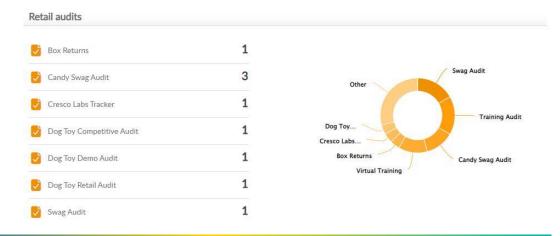
i. Plain List (Click \equiv > you will go to the Activities Feed)

Activities					_
2023 Customer Conversatio	ins 12/31/202	22 - 05/09/2023 👻	+ Add filter	5	Clear Apply
+			4		
				BerestordLn	
Google					Map data ©2023 Terms of Use
Active reps	8	Visits	සි	Forms	Ĩ
1		4		4	

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

orm reports > 2023 Product Sales					🛃 Export
12/31/2022-05/09/2023 × + Add	i filter			Clear	Apply
Summary Submissions					
Was the Doggie Selfie Stick on the shelf?			Did you sell a new product?		
9%			996		
18%	YesNone	8		YesNo	10
	None No	1		None	0
73%					

f. Retail Audits





g. Sales and Merchandising

Grder	3	Total:	\$24.53
Grder_LIT	4	Total:	\$14.96
📑 Return Boxes	2		

Rankings

Rankings by Place

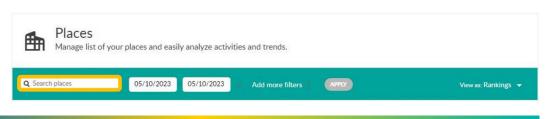
1. Click **Reports** > select **Overview**.

🔷 repsly	Q Find places, reps, forms, files and products	Your trial expires in 220 days Buy no	w 💭 🎲 Lyssa Ireland Thomas 🔹
Activities >	Activities Feed		
Places	All field activities = 05/09/	72023 - + Add filter	Clear Apply
Representatives			
Schedule	Map Satellite ORT		Toronto VT MAINE NOVA SCOTIA
	- C207		MA oBoston
Projects			VALOBOSTON O PENNIO Washington New York
			Washington New York
	Overview CAL	NTDRXFW UNKNOT UNKNOT NEVADA TIM UNITED States TIMOTO Set COLEMAN KARANA TIMOTO USMAN COLEMAN KARANA TIMOTO USMAN COLEMAN KARANA TIMOTO USMAN COLEMAN KARANA TIMOTO Set Deleget APTOCAN KARANA KARANA TIMOTO Set Deleget KATANAKA TIMOTO KARANAKARA	Vision Penn Contraction New York
a Reports > 👆	Overview CAL		Version Control Verk Washington New York Thinks Control Verk Washington Contro
Reports > 👆	Overview out		Version of New York Washington New York Hill, Version Charles And State And And And And And And And And And And
la Reports > ┣	Overview Ove		Washington New York

2. Under Rankings > select By Place.



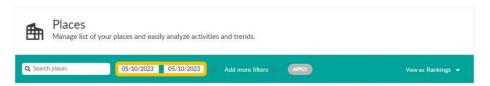
- 3. From this view, you can do the following:
 - a. Search Places



Page 24 | 48



b. Filter by date



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

Places Manage list of your places and	easily analyze activit	es and trends.	Filter places by the	r current status	x
Q Search places 05/10/20	23 05/10/2023	Add more filters	Filter by representa		ıgs
		6	 Filter by places tags 	v	
			Filter places by add		-
			Choose additional att		
			Filter by territory		•
			ADD THIS	FILTER CANCEL	-

d. View as:



Q 9	Search places	05/10/2023 05/	10/2023	Add more filters	APPLY	View as: Rankings 💌
e.	PLACE	VISITS	FORMS	PHOTOS	NOTES	Rankings
e	ALDI	1	0	0	0	1
C	Super Target	1	0	0	0	1

i. Rankings

Places Manage list

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

269	irch places	01/01/2023 05	/10/2023	Add more filters	APPLY	View as: Ranki	ngs 👻
	PLACE	VISITS	FORMS	PHOTOS	NOTES	SALES DOCUMENTS	RETA
Q	ALDI	15	8	24	0	1	
Q	ALDI	1	0	0	0	0	
Q	Big Lots - SW Jacksonville	2	1	0	0	0	



ii. Territory Rankings

Q Search places	05/10/2023	05/10/2023	Add more filters	APPLY	View as: Territory	rankings 👻
TERRITORY	VISITS	FORMS	PHOTOS	NOTES	SALES DOCUMENTS	RETAILA
Q OakLeaf	2	0	0	0	2	0

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

٩	Search places	01/01/2023	05/10/2023	Add more filters	APPLY	View as: Rank	tings 👻
e.	PLACE	VISITS	FORMS	PHOTOS	NOTES	SALES DOCUMENTS	RET
.)	ALDI	15	8	24	0	1	í
0	aldi	1	0	0	0	0	
	Q Big Lots - SW Jacks	ionville 2	1	0	0	0	
	(,

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

1	A	В	С	D	E	F	G	н	1
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	6	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	6	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	6	1	0	0	0	0.0000



Rankings by Representative

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

🔷 repsly	Q. Find places, reps, forms, files	and products	Your trial expires in 220 days Buy now		👌 Lyssa Ireland Thomas 💌
Activities >	Activities Feed				
Places	All field activities	05/09/2023 - + Add filter		a	Clear Apply
Representatives					
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2. Under Rankings > select By Representative.

Rankings	
By place	By representati

- 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.

11/2023 05/11/2023	Add more filters		Х
		Filter by territory	
	>	•	*
		Filter representatives by additional attributes	_
		Choose additional attribute 🖌	

Page 27 | 48



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

_			_				
01/	/01/2023 05/11/2023	Add more filters	PPLY				
	REPRESENTATIVE	WORKING TIME	VISITS	PLACES VISITED	FORMS	PHOTOS	SALES DOC
Q	Lyssa Ireland Thomas	23h 17'	88	19	29	38	9
Q	Dolly Barkon	0h 00'	0	0	0	0	0
Q	Fluffycorn Thomas	0h 00'	0	0	0	0	0

Showing 8 out of 8 records

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

1	A	В	С	D	E	F	G	н	1	J	к	L	M
1	ID	Name	Note	Orders	Total forms	Total visits	Total photos	Place notes	Retail audits	Places visited	Total	Working time	Time at place (minutes)
2	1235	Dolly Barkon		0	0	0	0	0	0	0	0.0000	0	6
3	fluffster0807	Fluffycorn Thomas		0	0	0	0	0	0	0	0.0000	0	0
4	FREP	Frank Repsly		0	0	0	0	0	0	0	0.0000	0	6
5	1234	LaBiscuit Shenault		0	0	0	0	0	0	0	0.0000	0	6
6	76620	Lyssa Ireland Thomas		9	29	88	38	1	20	19	40.9900	1397	7262
7	RALPHREP	Ralph Repsly		0	0	0	0	0	0	0	0.0000	0	0
8	RYREP	Ryan Repsly		0	0	0	0	0	0	0	0.0000	0	0
9	RREP	Ryhanna Repsly		0	0	0	0	0	0	0	0.0000	0	0

Sales Reports

By Product

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

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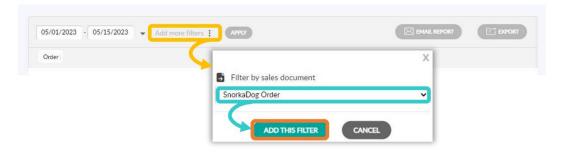
2. Under Sales Reports > select By Product.

🖻 By product 🛛 🛛 🔕 By product grou 🧔 By place	By territory
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- 3. From this view, you can do the following:
 - a. Filter by date

05/01/2023 - 05/15/2023 - Add more filters : AP2Y	
Order	

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.

rder					.
	Sales by Produ Analyze your sales re			SNAPSHOT	TREND BY 👻
	PRODUCT ID	NAME	PRICE	SALES QUANTITY	SALES TOTAL
Q	ABCT	Angela BassetHound Chew Toy	\$ 10.95	5	\$ 54.75
Q	MRCT	Mark Ruffalo Squeaky Toy	\$ 10.95	4	\$ 43.
~		Sarah Jessica Barker Squeaky Toy	\$ 9.99	4	\$ 39.9
Q	SJBST				
-	SJBST CFDS	Colin Feral Sunglasses	\$ 4.95	7	\$ 34.6
Q		Colin Feral Sunglasses Nibbles n Bits - Chewy	\$ 4.95 \$ 7.99	7	\$ 34.6 \$ 31.9

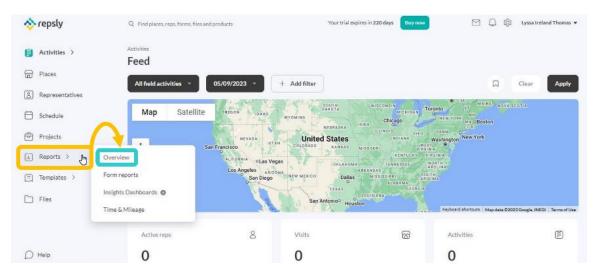


ID				
	Name	Unit price	Quantity	Total
ABCT	Angela BassetHound Chew Toy	10.95	5	54.75
MRCT	Mark Ruffalo Squeaky Toy	10.95	4	43.8
SJBST	Sarah Jessica Barker Squeaky Toy	9.99	4	39.96
CFDS	Colin Feral Sunglasses	4.95	7	34.65
NNBC	Nibbles n Bits - Chewy	7.99	4	31.96
NNBCR	Nibbles n Bits - Crunchy	7.99	4	31.96
BCDP	Benedict Cumberbeagle Dog Perfume	7.95	3	23.85
BPCT	Millie Bobby Bone Dog Bones	4.79	4	19.16
BPDD	Brad Pittbull Doggie Deodorant	6.79	2	13.58
AACT	Ana De Alligator Chew Toy	10.95	1	10.95
FA101001-20	1" PH2 Impact Driver Bit 20 Bulk	9.98	1	9.98
CZBBones	Catherine Zeta Bones Dog Bones	4.79	2	9.58
MWDB	Mark Wahlbone Dog Bones	4.79	1	4.79
	MRCT SJBST CFDS NNBC NNBCR BCDP BPCT BPDD AACT FA101001-20 CZBBones	MRCTMark Ruffalo Squeaky ToySJBSTSarah Jessica Barker Squeaky ToyCFDSColin Feral SunglassesNNBCNibbles n Bits - ChewyNNBCRNibbles n Bits - CrunchyBCDPBenedict Cumberbeagle Dog PerfumeBPCTMillie Bobby Bone Dog BonesBPDDBrad Pittbull Doggie DeodorantAACTAna De Alligator Chew ToyFA101001-201" PH2 Impact Driver Bit 20 BulkCZBBonesCatherine Zeta Bones Dog Bones	MRCTMark Ruffalo Squeaky Toy10.95SJBSTSarah Jessica Barker Squeaky Toy9.99CFDSColin Feral Sunglasses4.95NNBCNibbles n Bits - Chewy7.99NNBCRNibbles n Bits - Crunchy7.99BCDPBenedict Cumberbeagle Dog Perfume7.95BPCTMillie Bobby Bone Dog Bones4.79BPDDBrad Pittbull Doggie Deodorant6.79AACTAna De Alligator Chew Toy10.95FA101001-201" PH2 Impact Driver Bit 20 Bulk9.98CZBBonesCatherine Zeta Bones Dog Bones4.79	MRCTMark Ruffalo Squeaky Toy10.954SJBSTSarah Jessica Barker Squeaky Toy9.994CFDSColin Feral Sunglasses4.957NNBCNibbles n Bits - Chewy7.994NNBCRNibbles n Bits - Crunchy7.994BCDPBenedict Cumberbeagle Dog Perfume7.953BPCTMillie Bobby Bone Dog Bones4.794BPDDBrad Pittbull Doggie Deodorant6.792AACTAna De Alligator Chew Toy10.951FA101001-201" PH2 Impact Driver Bit 20 Bulk9.981CZBBonesCatherine Zeta Bones Dog Bones4.792

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

By Product Group

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



2. Under Sales Reports > select By Product Group.

6	By product	8	By product grou	By place	6	By territory
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- 3. From this view, you can do the following:
 - a. Filter by date

05/01/2023 - 05/15/2023 - Add more filters : APPLY	
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b. Add more filters > click the three dots (kebab menu) to open > select the sales document > click Add This Filter.

Order		X
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	SnorkaDog Order	~

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

Drder		
Sales by Product Gro Analyze your sales results by	DUD Product groups	SNAPSHOT TREND BY
GROUP ID	NAME	SALES TOTA
GROUP ID SDPS	NAME SnorkaDog Pet Supplies	SALES TOTA \$ 318.9

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

1	A	В	C
1	ID	Name	Total
2	SDPS	SnorkaDog Pet Supplies	318.99
3	Merchandise	Merchandise	9.98
1.00			



By Place

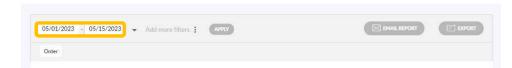
1. Click **Reports** > select **Overview**.

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2. Under Sales Reports > select By Place.

Sales Reports			
By product	By product grou	🛃 By place	By territory
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- 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.

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SnorkaDog Order	~

Page 32 | 48



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

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Order			
	Sales by Place Analyze your sales results by Place		SNAPSHOT TREND BY -
	PLACE ID	NAME	SALES TOTA
Q		NAME Pet Supplies Plus	SALES TOTA \$ 318.9

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

1	Α	В	С	D	E	F	G	Н	1
1	ID	Name	Street Address	ZIP	ZIP ext	City	State	Country	Total
2	12	Pet Supplies Plus	510 Blanding Blvd, Suite 50	32073		Jacksonville	Florida	United States	318.99
3	4	Publix Super Market	9518 Argyle Forest Blvd	32222		Jacksonville	Florida	United States	9.98
122									

By Territory

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

🔆 repsly	Q. Find places, reps, forms, files an	d products	Your trial expires in 220 days	buy now	💭 🔅 Lyssa Irel	and Thomas 💌
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🖟 Reports > 🔥	Overview Form reports Insights Dashboards	NEVADA III. UTAN DALIEGENEA Los Aggeles San Dege San Dege	ILLINOIS States Hotak KARSS MISSOUR ORLAHOMA TENNESS Dellas AISSISTIC COUSTANA	OTTO 2154 Washington New York Victoria Calendra		il Terms of Use

2. Under Sales Reports > select By Territory.

by product	By product grou	👌 By place	👌 By territory
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- 3. From this view, you can do the following:
 - a. Filter by date

05/01/2023 - 05/15/2023 ▼ Add more filters : APPLY EMAIL REPORT C EVO				
	EMAIL REPORT	APPLY	 Add more filters 	05/01/2023 - 05/15/2023

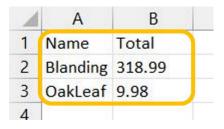
b. Add more filters > click the three dots (kebab menu) to open > select the sales document > click Add This Filter.

Order		X
	Filter by sales document	
	SnorkaDog Order	~

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

05/01/2023 - 05/15/2023 → Add more filters : APPLY	
Order	
Sales by Territory Analyze your sales results by Territory	SNAPSHOT TREND BY
NAME	SALES TOTAL
Blanding	\$ 318.9
OakLeaf	\$ 9.90

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





By Representative

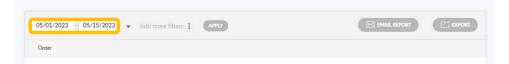
1. Click **Reports** > select **Overview**.

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2. Under Sales Reports > select By Representative.

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- 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.

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Filter by sales document	
SnorkaDog Order	~

Page 35 | 48



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

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Drder		
Sales by Representative Analyze your sales results by Re	/e epresentative	SNAPSHOT TREND BY
REPRESENTATIVE ID	NAME	SALES TOTAL

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

1	A	В	С
1	ID	Name	Total
2	76620	Lyssa Ireland Thomas	328.97
3			1

Schedule Reports

By Representative

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

🔷 repsly	Q. Find places, reps, forms, files	and products	Your trial expires in 220 days	Buy now	30\$	🕴 Lyssa Ireland Thomas 💌
Activities >	Activities					
Places	All field activities	05/09/2023 - + Add filter			D	Clear Apply
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Schedule	Map Satellit	e oregon loand	SOUTH WISCONSIN DAKOTA MIC	N.H	MAINE NOVA	
		WYOMINS	Chicago	NEW YORK MAT	Boston	
		WYOMINS	NEBRASKA JOWA ILLINOIS I States KANSAS MISSOURI	NA Washington New Wissington New Wis		
Projects	Overview	NEVADA San Francisco OALISORNIA OLAS Vegas	ILLINOIS States KANSAS MISSOURI REN OKLAHOMA TENNESS	OHIO PENN O Washington New VIRGINIA VIRGINIA		
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Projects	Overview Form reports Insights Dashboards @	NUMBER NUMBER San Francisco CALIOSHIA OLAS Vegas Los Aggeles Astrona, San Diego Hart Mitrico	ILUNCATION ILUNCO States INVISION KARAN USSON CARANASS MISSISSIP CARANASS MISSISSIP CARANASS CARAN	OHIO PENN CAR Washington New V VIEST Tuch VIESTA Carolina Carolina Carolina Carolina Carolina Carolina	York	022 Google, INEGI Terms of Use

2. Under Schedule Reports > select By Representative.

Schedule Reports

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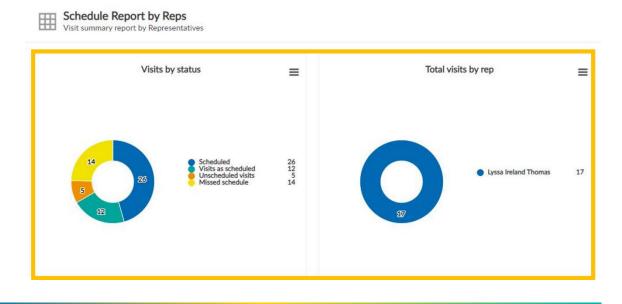
- 3. From this view, you can do the following:
 - a. Filter by date

05/01/2023 - 05/15/2023 -	Add more filters	APPLY	
Order			

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

Order		X	
	Filter places by their cu	rrent status	
	127	~	
	Filter by places tags		
	Filter by territory		
	100	-	

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



Page 37 | 48



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.

1	A	В	С	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
7						

By Place

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

~	repsly	Q Find places, reps, forms, fil	es and products	Your trial expires in 220 days Buy now		🗄 🛛 Lyssa Ireland Thomas 💌
۵	Activities >	Activities Feed				
ଳ	Places	All field activities	05/09/2023 - + Add filter		۵	Clear Apply
8	Representatives). 		
₿	Schedule	Map Satelli	TE OREGON JOANO WYOMING	Chicago		ISCOTIA
Ð	Projects		NEVADA San Francisco	d States	Vashington New York	
-			San Francisco	WISSOURI. VIRGINI	A CONTRACTOR OF A	
di l	Reports >	Overview	CALIFORNIA OLas Vegas	RENTUCKY VIR		
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e	Templates >	Form reports Insights Dashboards 💿	Los Angeles ARIZONA San Diego	ORLAHOMA TENNESSEE NA ARRANGAS COUT Dallas MISSISSEI COUT S ALABAMA COUT TEXAS COURANA OUSSINAL	RTH GUNA NA NA	2023 Google, INEGI Terms of Use

2. Under Schedule Reports > select By Place.





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

05/01/2023 - 05/15/2023	✓ Add more filters :	APPLY	
Order			

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

Order	6	х
	Filter by representative	
	- ~	
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	🔓 Filter representatives by custom	attribute
	Choose representative cust 🗸	

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

Schedule Re Visit summary re	eport by Places					
	Visits by	y status	=	Total v	isits by place	Ξ
14	23	Scheduled Visits as scheduled Unscheduled visits Missed schedule	26 12 5 14		ALDI Super Target PetSmart Publik Super Market Bisky's Biscuits Dolly's Place Circle K CubeSmart Self Storage Pet Supplies Plus	5222 11 11



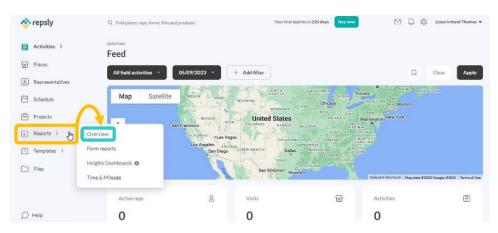
NAME	TOTAL VISITS	SCHEDULED	SCHEDULED VISITED	UNSCHEDULED VISITS	MISSED
ALDI	5	7	5	0	2
Super Target	2	6	2	0	4
PetSmart	2	3	2	0	1
ALDI	0	2	0	0	2
Bisky's Biscuits	1	1	0	1	1

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

1	A	В	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		0	1	0	0	1

Coverage Report

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



2. Under Coverage Report > select Coverage Report.

Coverage Report

Coverage Report



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

05/01/2023 - 05/15/2023	✓ Add more filters :	AFFLY	
Order			

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

Order		X	
	lilter by representative		
	• •		
	🛱 Filter by place		
	Filter by places tags		
	Filter by territory		
	Filter representatives by custom a	attribute	

4. You will see a data table showing coverage by the whole company, territory, and representatives. Click Export to get the data.

Analyze how we	Report ell your team is covering	the territory				
Analyze now we	en your team is covering	, the territory				
	Total places (?)	Places visited (?)	Coverage (%)	Time traveling ⑦	Time at place ⑦	Link to coverage lists
Whole company	32	0	0 %			Places not visited
Territories]					
Orange Park	-	0		-	-	
Blanding	8	0	0 %	-	10	Places visited Places not visited
OakLeaf	10	0	0 %			Places visited
Representatives	8					
Lyssa Ireland Thomas	25	0	0 %	-		Places not visited
Dolly Barkon	2	0	0 %	-		Places visited Places not visited
LaBiscuit Shenault	2	0	0 %	17		Places visited Places not visited



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

	Whole Com	pany			С			D		E
1	Total places Pl	aces visited	Co	verage	per	centage	Time t	raveling	Tim	ne at place
2	32 0		09	6			-		7	
C	Ferritories			С			U	E		- F
1	ivame	rotar p	aces	Places vis	ited	Coverage p	percentag	e Time trav	eling	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%		-		-
	Gainesville	0		0		0%		-		-
20	University of Florida C	ampus 0		0		0%		-		1
21	3rd party	2		0		0%		-		-
	NA	0		0		0%		-		-
	Representat	ives		С		D		E		F
1	Name	Total places	Place	es visited	Cov	erage perc	entage	Time travel	ing T	Time at place
2	Lyssa Ireland Thomas	s 25	0		0%			1	1	a - 1
3	Dolly Barkon		0		0%					
4	LaBiscuit Shenault		0		0%			-i.		
5	Fluffycorn Thomas		0		0%			-		
6			0		0%			- 2		
7	Ryan Repsly		0		0%					
8	Ryhanna Repsly		0		0%					-
-			0		0%			<u>8</u>		2 0
9	Ralph Repsly	U	U		0 %		1	8	-	•

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.

/01/2023	3 - 05/16/2023	• A	dd more filters	: 6	PPLY				EMAIL REPO
v.	eekly Sales								ADD CHARTS
				20		ys sold: Sales, trend t	y month		=
12				20	Lorrodder	uco, a cho c	, monut		
10									
8							4		
6									
4					я		2		
2					8	2	- 4		
					2	1			

- 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**.

1

Send				
Daily report	Ň			
Starting date	Time	Recipients		
5/9/2023	Noon 🗸	Lyssa Ireland Tho	omas ×	
This report	vill be sent every da	iy at 12:00 starting 5/	/9/2023.	

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



Time & Mileage Report

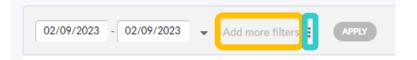
1. Click **Reports** > select **Time & Mileage**.

🔷 repsly	Q Find places, reps, forms,	files and products Your trial expires in 172 days Buy now	🗹 💭 🔯 Lyssa Ireland Thomas 🕶
Activities	\$ >	IMPERSONIFICATION	
음 Places	Activities Feed		
la Users	All field activities 👻	06/26/2023 × + Add filter	Clear Apply
Schedule			
Projects	Map Sate	Ilite ORECON IDAHO WYOMING NEBRASKA IOWA Chicago	NEW YORK NH NEW YORK OBOSON CT RI
II. Reports	Overview	NEVADA UTAH UTAH COLOBADO MILINOIS INDIANA OHIO WEET	Washington New York
🗐 Tempi te	s > Form reports	CALIFORNIA	A STATE OF A
Files	Insights Dashboards (0)	Los Angeles ARIZONA San Diego NEW MEXICO Dallas MISSISSIPPI SOUT CAROUN	
	Time & Mileage	TEXAS GEORGIA	
	Google	San Antonio ^O Houston	Keyboard shortcuts Map data ©2023 Google, INEGI Terms of Use

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

01/01/2023 - 01.	/31/2023 👻 A	dd more filt	ers : APPLY)					
Working Time									
REPRESENTATIVE	REPRESENTATIVE	DATE	WORKDAY START	WORKDAY END	FIRST VISIT	LAST VISIT	MILEAGE START (MI)	MILEAGE END (MI)	MILEAGE TO
	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
Q	Lyssa Ireland Thomas	1/17/2023	8:57 AM	5:02 PM	9:01 AM	11:59 PM	0	1.52	1.52
R	Lyssa Ireland Thomas	1/13/2023	12:03 PM		12:03 PM	11:59 PM	0	0	0

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





 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
	Ether have been to re-
	Filter by places tags
-	Filter by territory
	Filter representatives by custom attribute
N	lorthern 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)

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

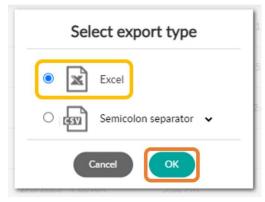
Exporting the Time and Mileage Report

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

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



2. Select Export Type > click OK.

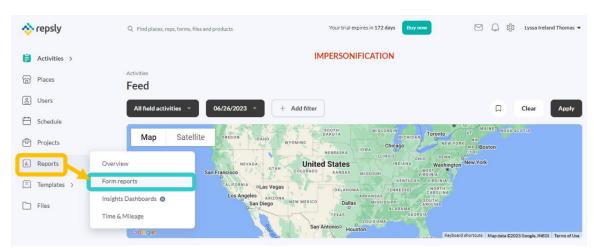


3. Open and save the report.

A B C D	1	1	6	H	1	1	- K	1. C	M	1 1	0	- P	0		5	T.	
1 Oute Begin dati End datet Fotal	Miesper	Mileage	e Mileage	Nillemote V	No of vit	it Min of vo	Mex of vo	Mir/Max	Represe	e Represent Ti	read spec	r Time in	th Pause to	H. Writing	t time at p	i Time Re	in Time
2 1/31/2023 1/31/2028	0.00	0.00	5.00	5	1	1/81/2023	11/31/2023	004	76620	Lyssa treis a	16	0	5	0:00	6:36	0100	0.00
1 1/23/2023 1/23/2023 1/23/2023 100	0.00	5.00	6.00	6	5	1/25/2023	11/23/2025	5	78620	Lynna trefe 5		51	5	3:40	0:09	0:00	1:31
4 1/20/2023 1/26/2023 1/20/2023 34	0.00	0.00	6.80	\$	5	1/20/2023	1 1/20/2021	413	76626	Lyssa Ireta at	0	3	5	0:34	0:40	10:00	0:00
5 1/19/2023 1/19/2023 5	5.00	6.00	6.00	5	5	1/19/2021	11/19/2021	716	76620	Lyns Hels 7	16	8	5	0.00	11:56	0100	0:00
E 1/17/2023 1/17/2023 1/17/2023 464	5.00	\$1.52	3.32	5	5	1/17/3021	11/17/2023	Č897	76620	Lyssa inet/4	72	32	5	8.04	7.52	0,00	0.13
7 1/13/2029 1/13/2023 5	5.00	5.00	6.00	5	5	1/13/2021	11/11/2023	715	79620	Lyssa Helda	97	5	5	0.00	10:07	0100	0.00
E 1/12/2029 1/12/2029 1/12/2029 997	5.00	0.00	\$.00	\$	5	1/12/2021	11/12/2021	64	76630	Lyssa Ireis's	1	465	5	8.17	0.11	0:00	7.46
9 1/4/2023 11/4/2023 : 5	\$0.00	0.00	6.00	5	5	1/4/2023	11/4/2023	5	\$798.20	Lynne trefe's		5	5	0:00	0.01	0100	0.00
1/3/3023 11/3/2023 11/3/2023 15/3/2023 (5/3)	5.00	5.00	5.00	5				5	76620	Lyssa Heldo		5	5	4.36	0:00	6:00	0:00
1																	
12																	
0																	
4																	

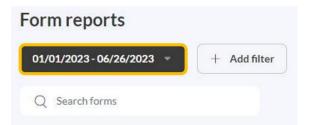
Form Reports

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.

Form reports					
01/01/2023-06/26/2023 📼	+ Add filte	er Filters • 1	^		Clear Apply
R epresentatives	•	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 TI	nomas 💌	
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.

023 Celebridog Product Sales 🔹				🛃 Export
D1/01/2023 - 12/31/2023 - + Add filter Filt	ters•1 ~		Clear	Apply
ummary Submissions				
Was the Doggie Selfie Stick on the shelf?		Did you sell a new product?		(
14%		0%		
• Yes	6		• Yes	4
• No	1	43%	No	3
None	0		57% • None	0
BASK				
86%				