iOS

repsly

Training Guide
REPRESENTATIVES
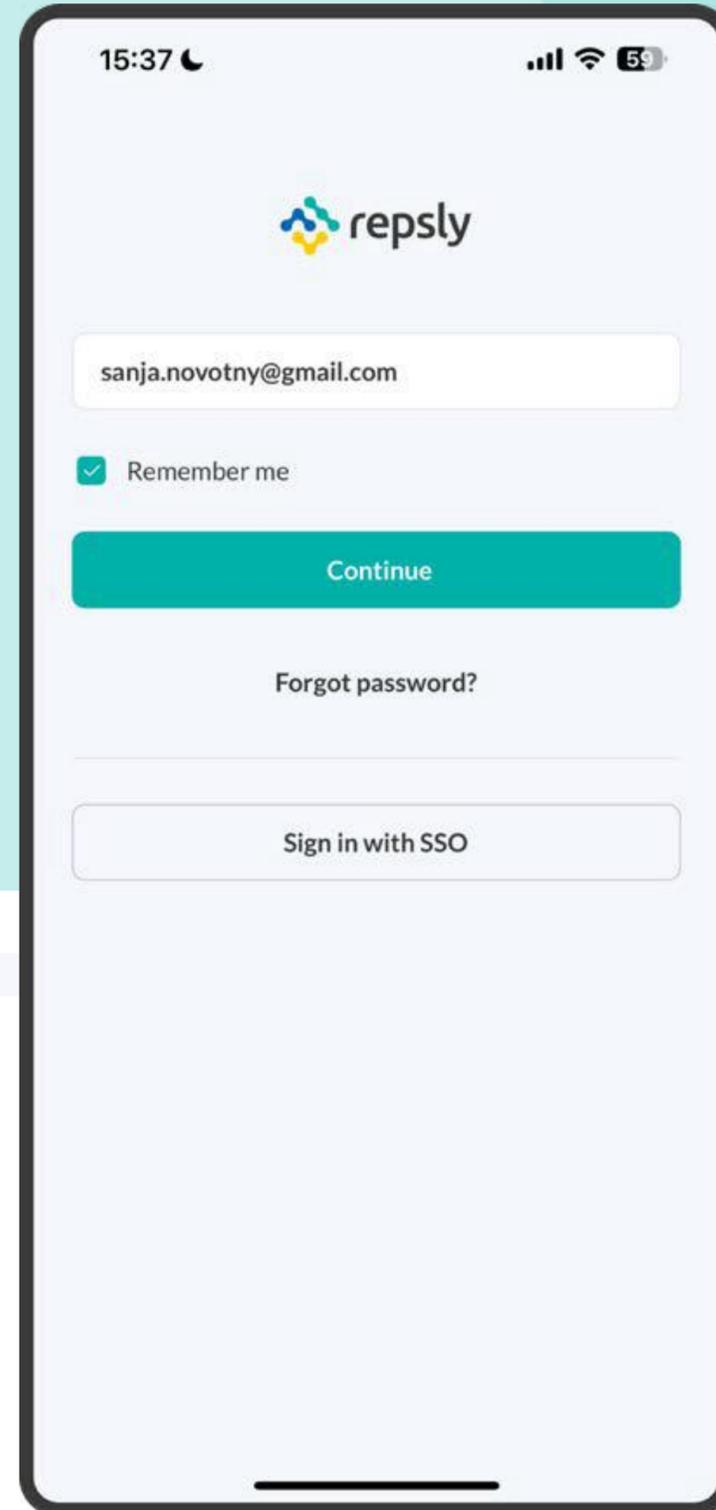
iOS VERSION

Table of contents

HOW TO INSTALL REPSLY ON iOS

Welcome to Repsly! New representatives will need to install the Repsly app on their mobile device.

**1** Once you've installed the app, select SIGN IN WITH SSO.

HOW TO SIGN IN TO REPSLY WITH SSO

1 Scroll down on the login screen and select SIGN IN WITH SSO.

2 Use your SailPoint Vendor ID credentials @bbypartner.

3 Your password will be your SailPoint Vendor ID password.

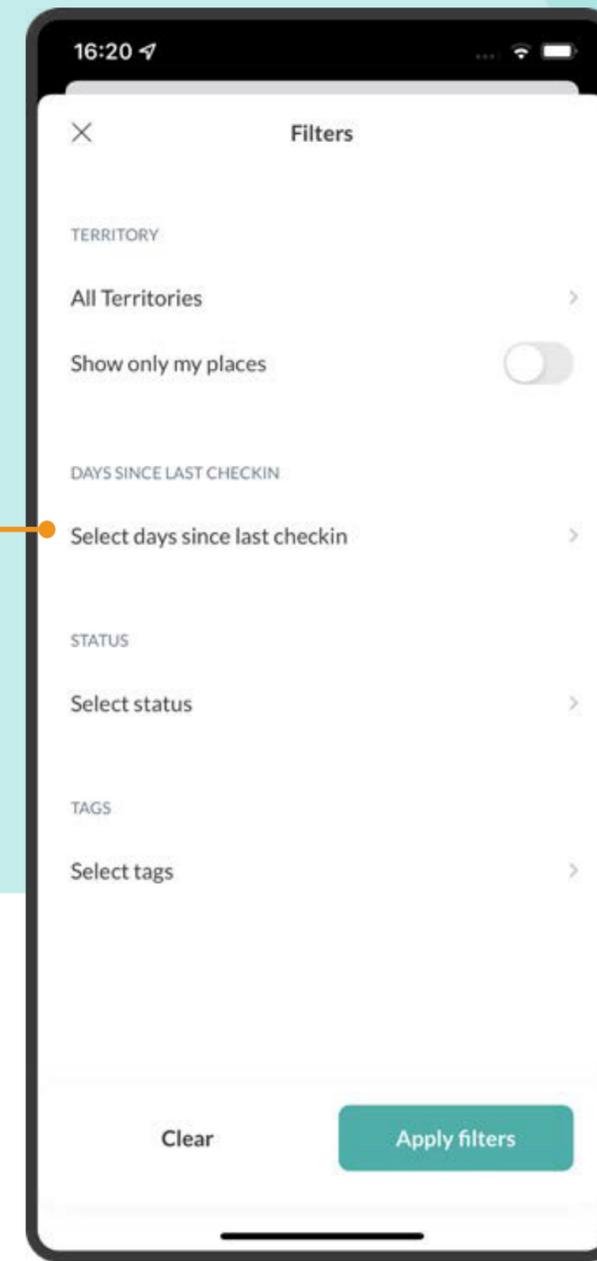**4** It will take you through an authentication process.
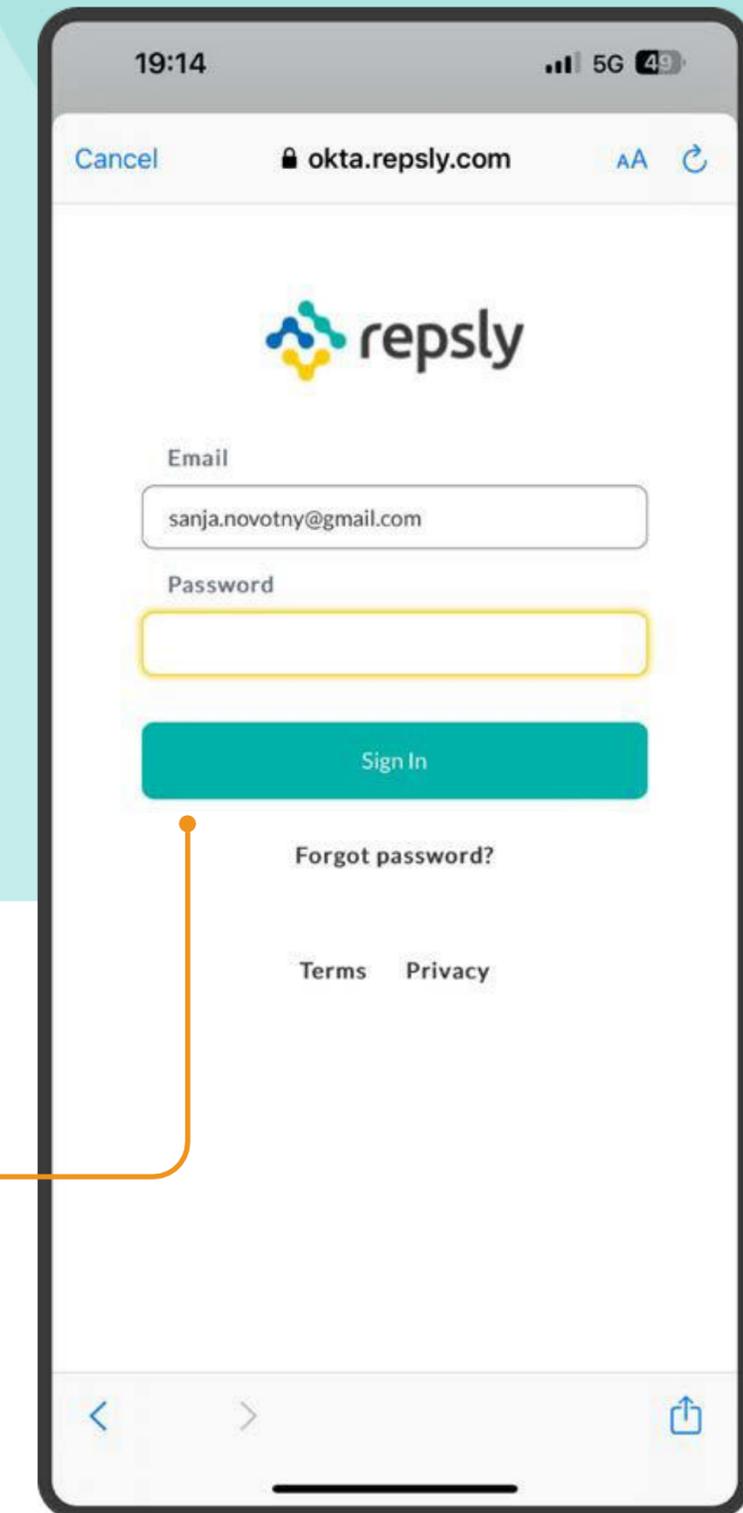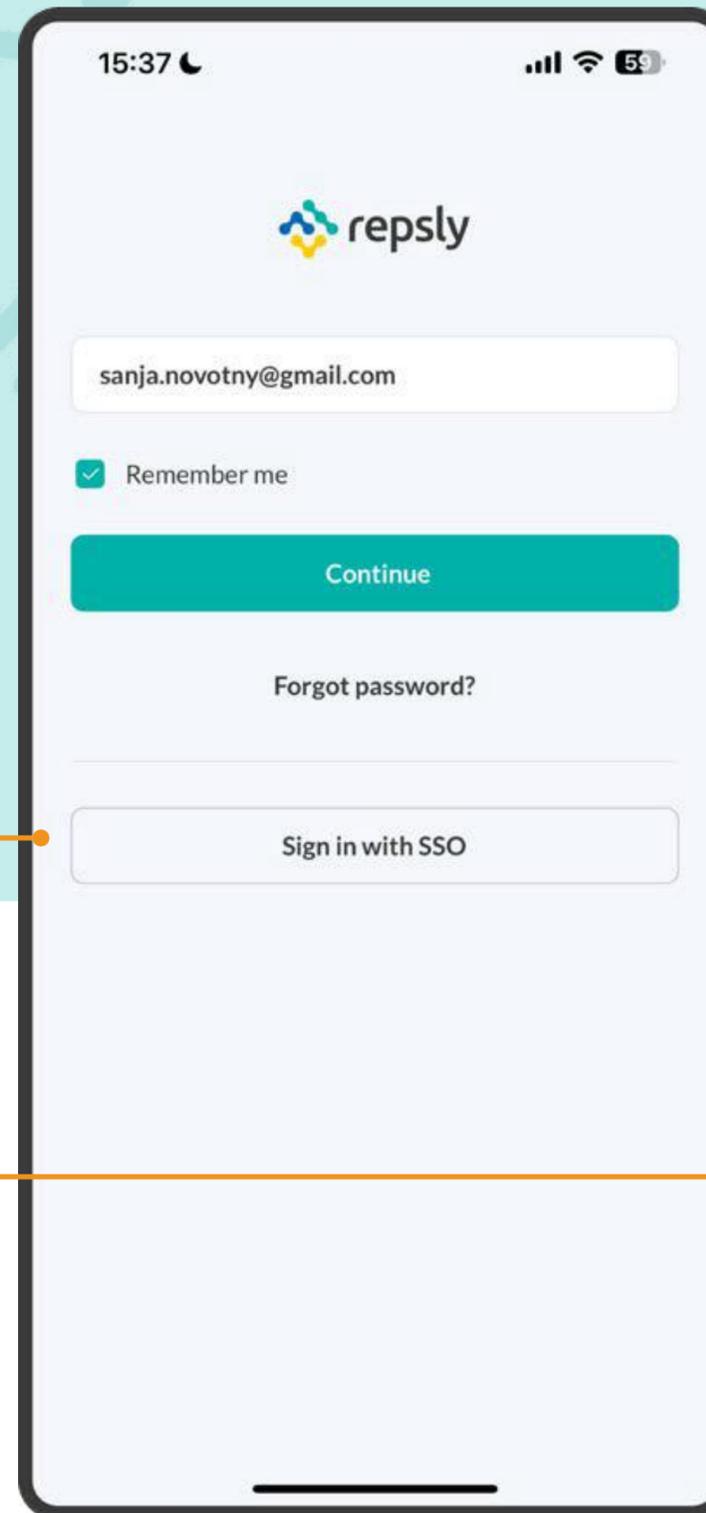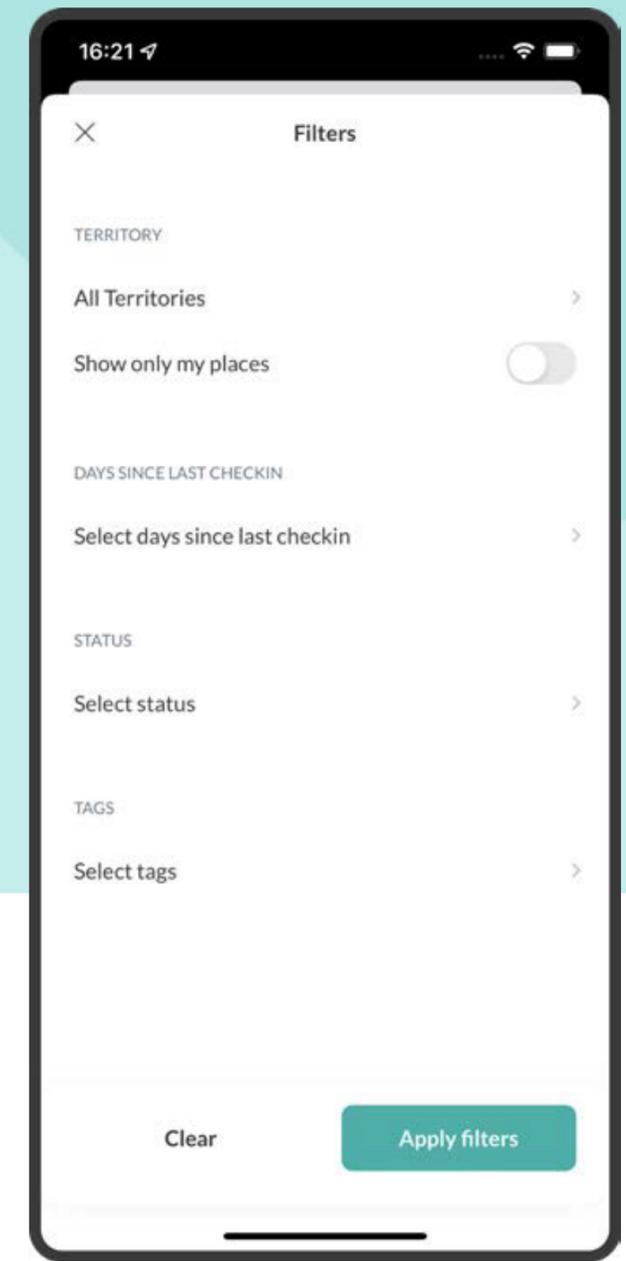
HOW TO FIND PLACES THAT HAVEN'T BEEN VISITED

Repsly makes it easy to improve territory coverage by showing you the places you haven't visited recently, so you can add them to your schedule for follow-up.
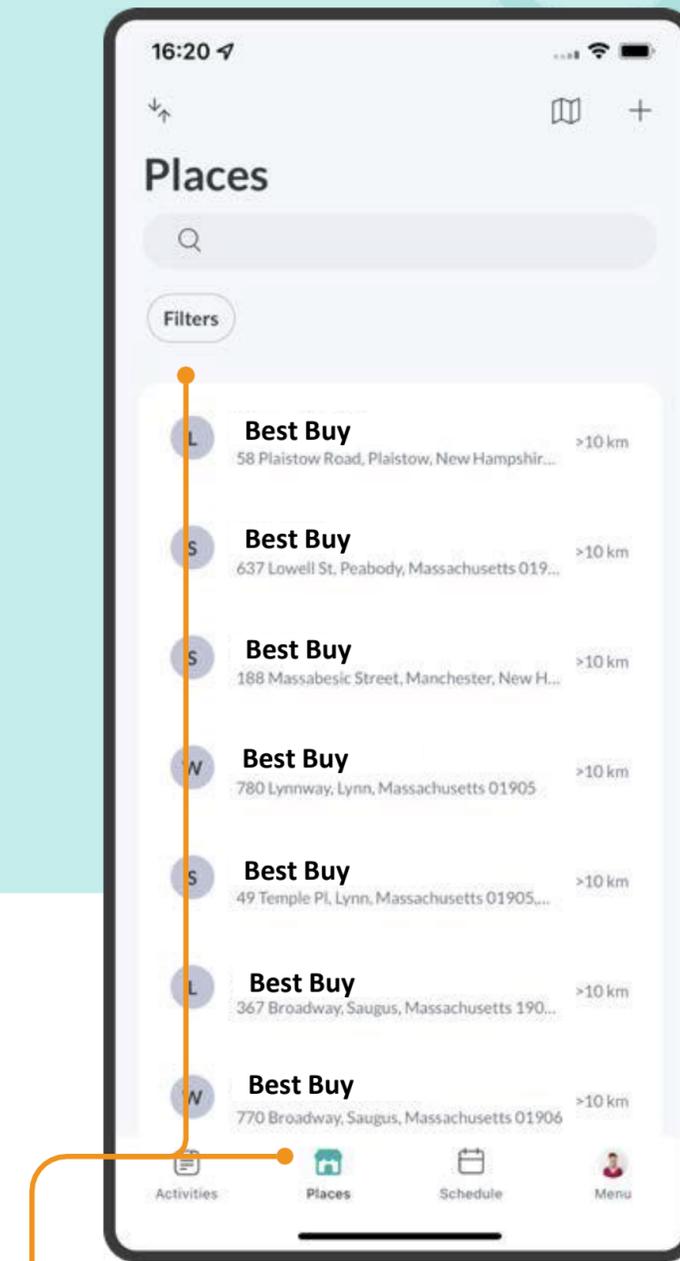
**1** Tap on the PLACES tab and then on the FILTER icon.

2 Tap DAYS SINCE LAST CHECK IN, and select the date range you want to view.

3 You can narrow down the criteria further using additional filters (such as place or tags). Click APPLY FILTERS to view your refined place list.
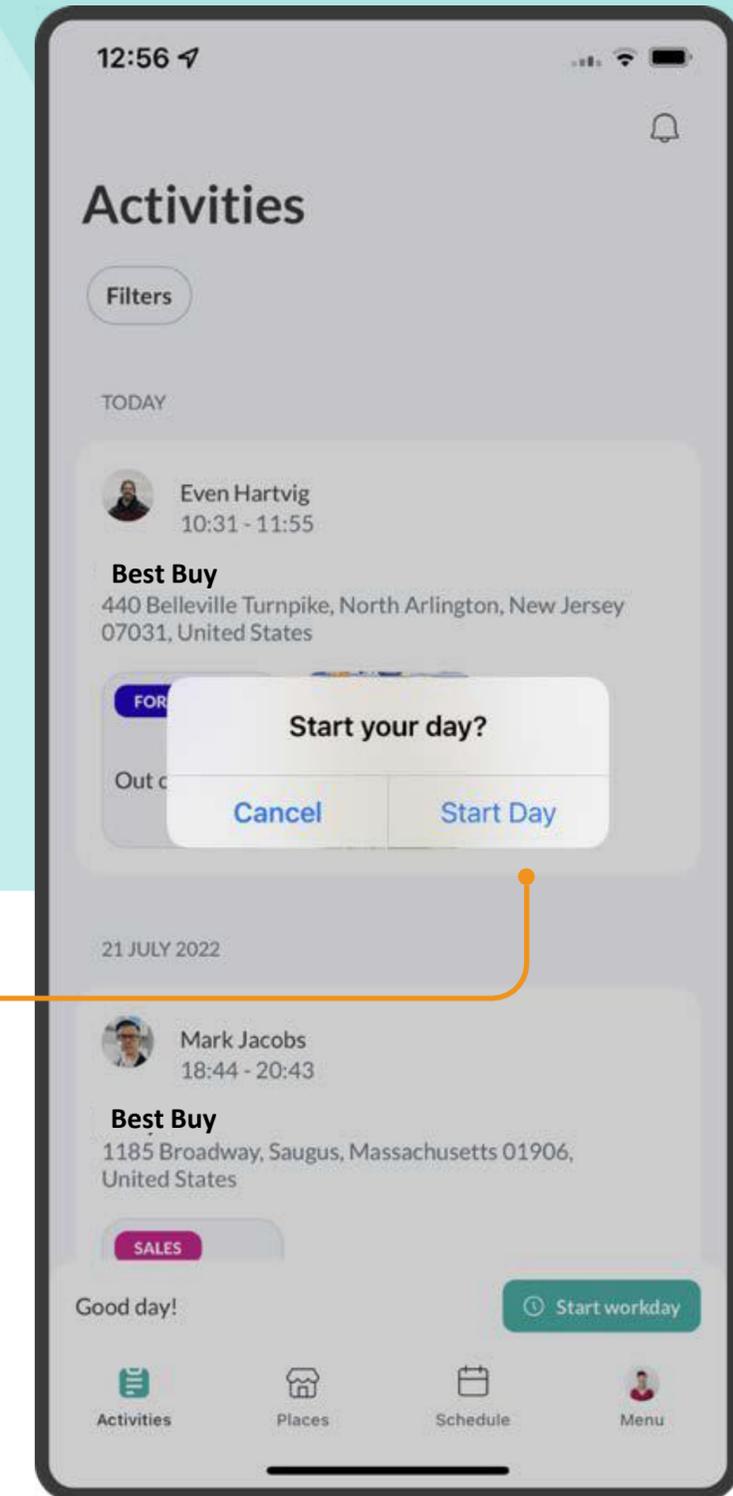
HOW TO START YOUR DAY

Repsly can automatically calculate your working hours and mileage in the background while you work, so you don't need to enter these details manually.
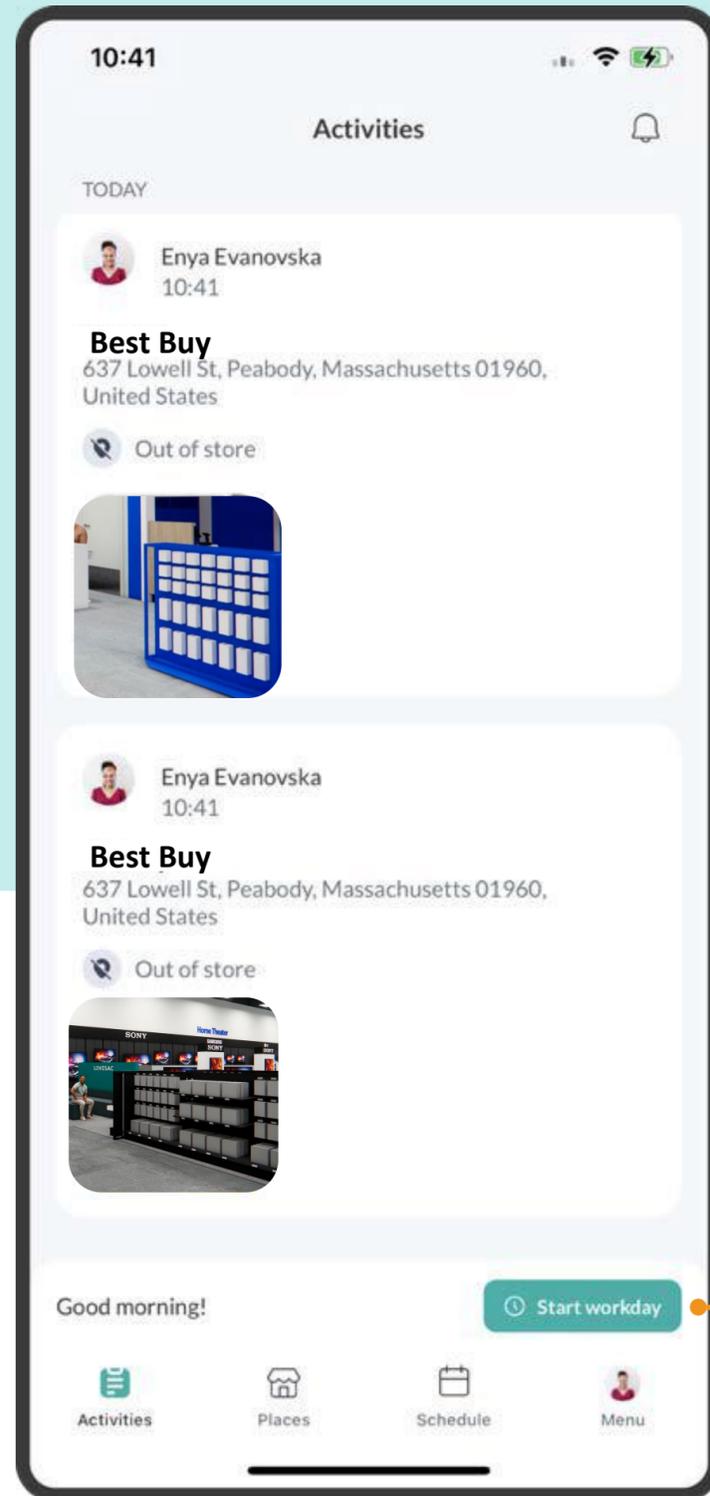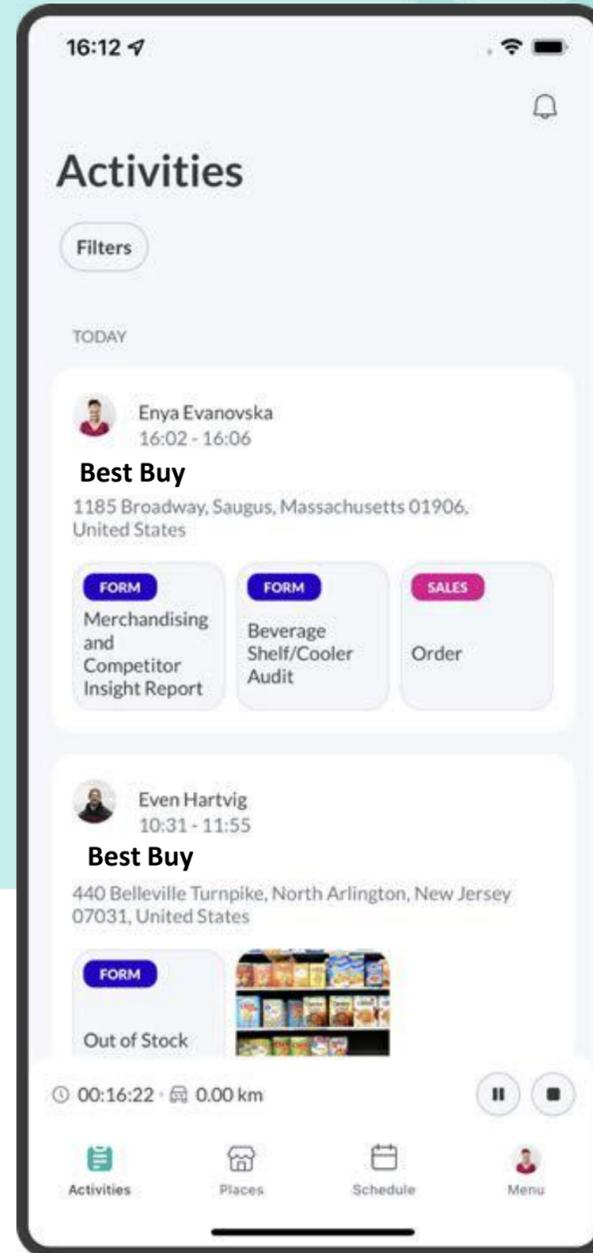
1 Tap on the START WORKDAY button.

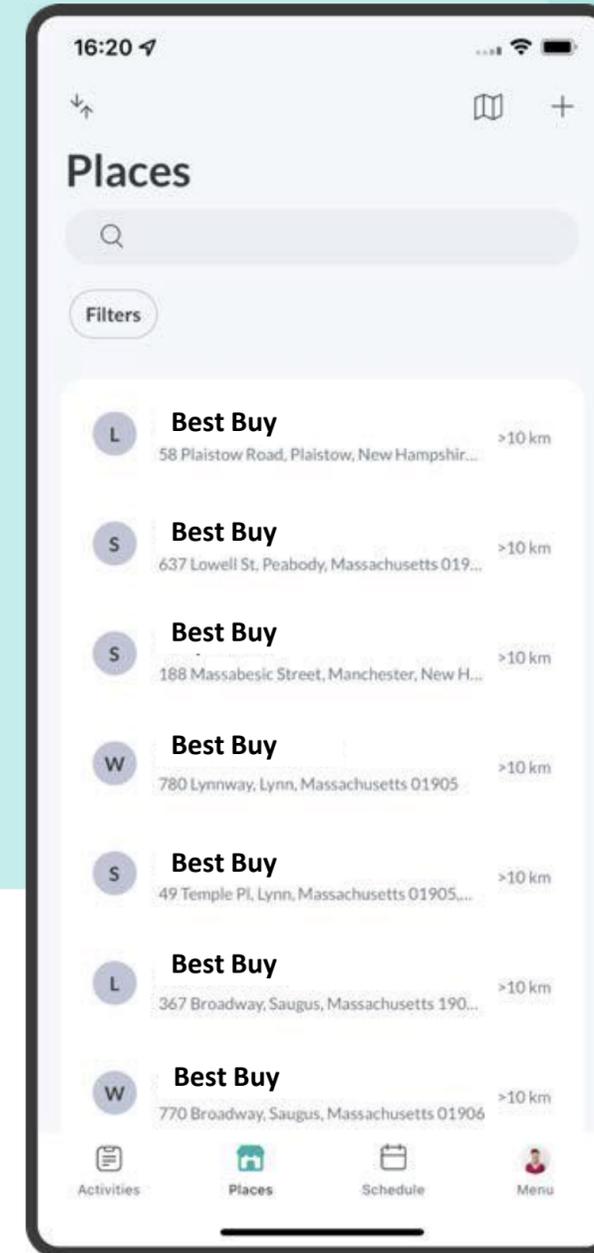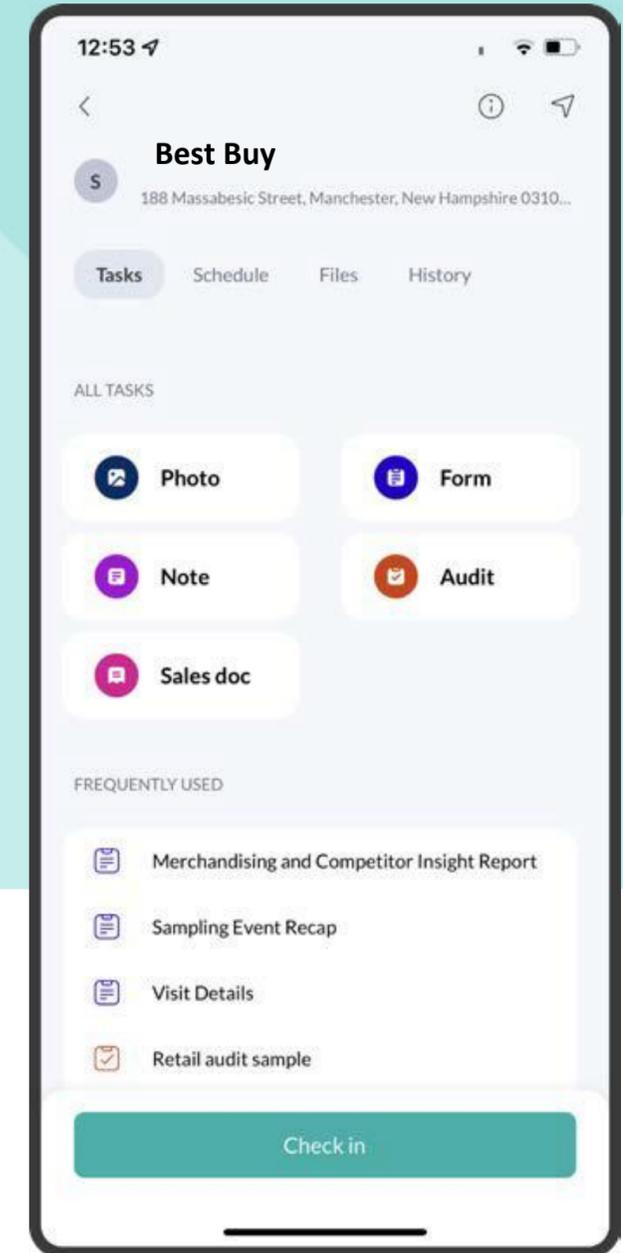Your day will start after **2** clicking on START DAY.

HOW TO CHECK IN

Checking into a place at the beginning of each visit makes sure all of your activity gets properly tagged to the right place, and helps you better understand how you spend your time during the workday

1 Tap on the PLACES tab.

2 Select the place you want to visit from the Places list.

3 Tap on the green CHECK IN button. You are now checked in. Use the buttons on the screen to complete your store visit.

HOW TO COMPLETE A TASK FROM A SCHEDULED VISIT

To complete a visit, all assigned tasks must be finished before you check out. The Schedule feature shows your daily visits and tasks, and once checked in, the app guides you through what needs to be done.

1 Tap on SCHEDULE, and select the visit. You can also view tasks in advance to stay prepared.
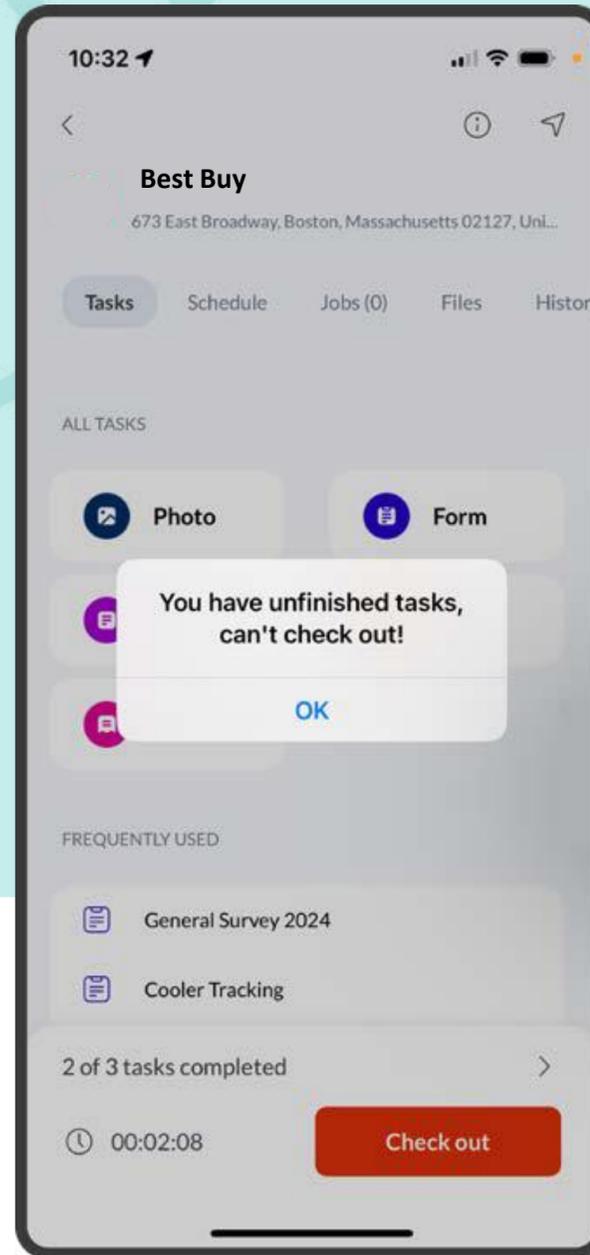
Once you check in, the Repsly app will display the number of mandatory tasks you need to complete at that location. **2**
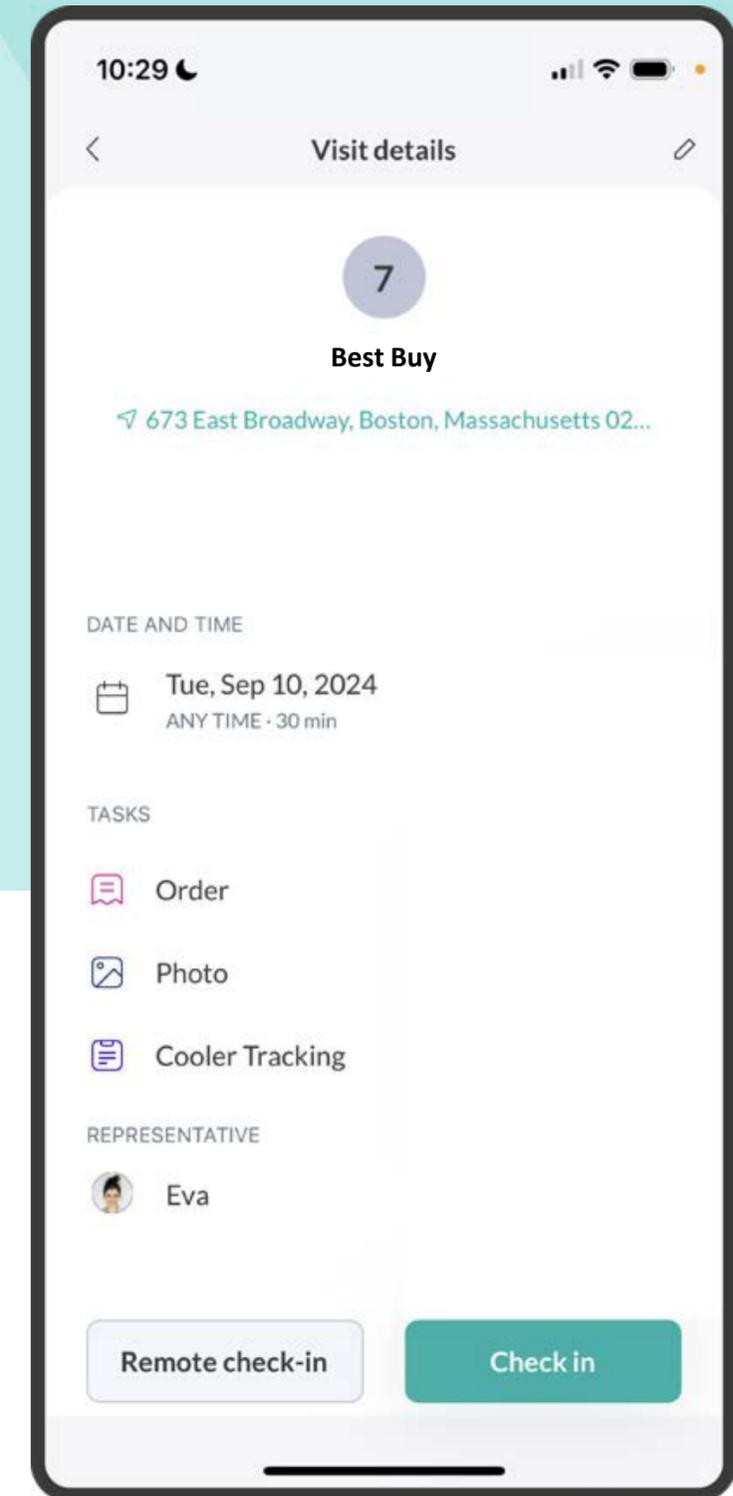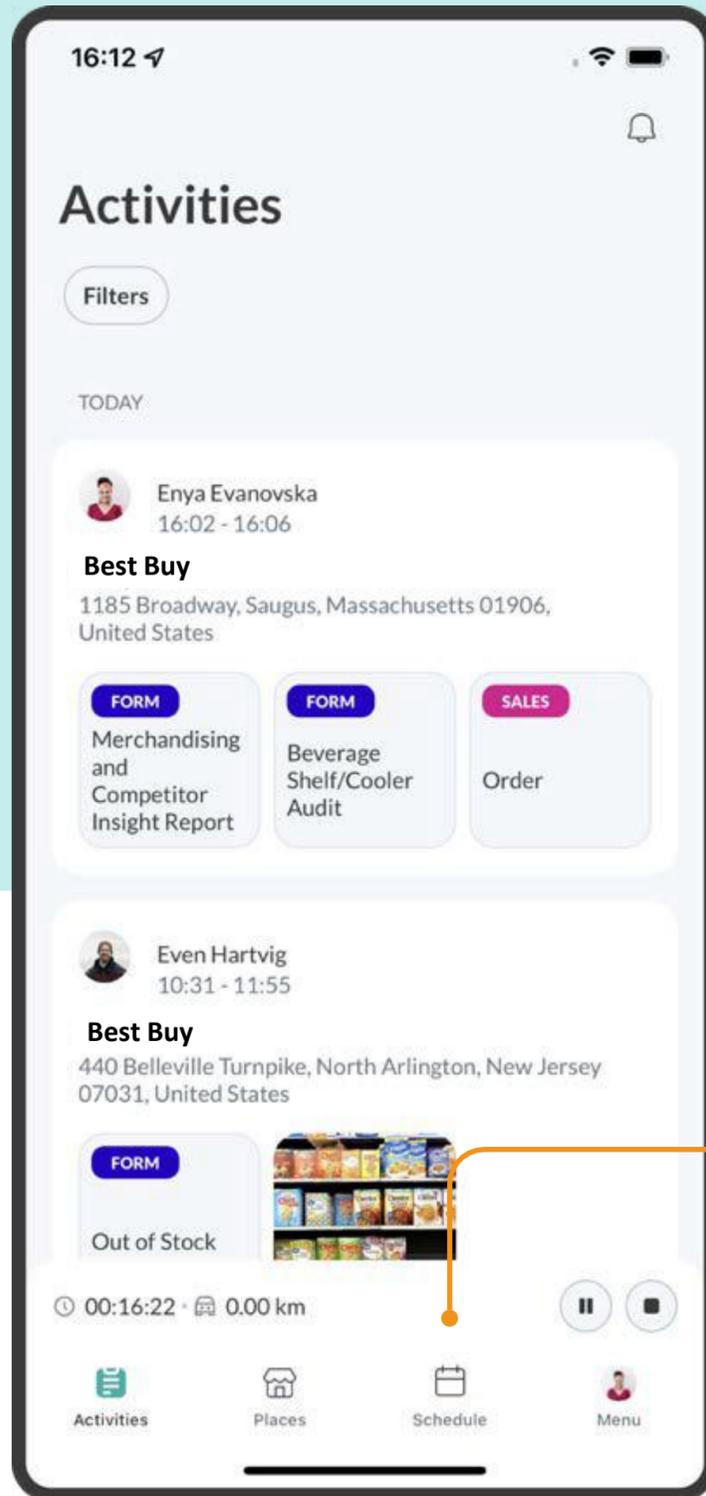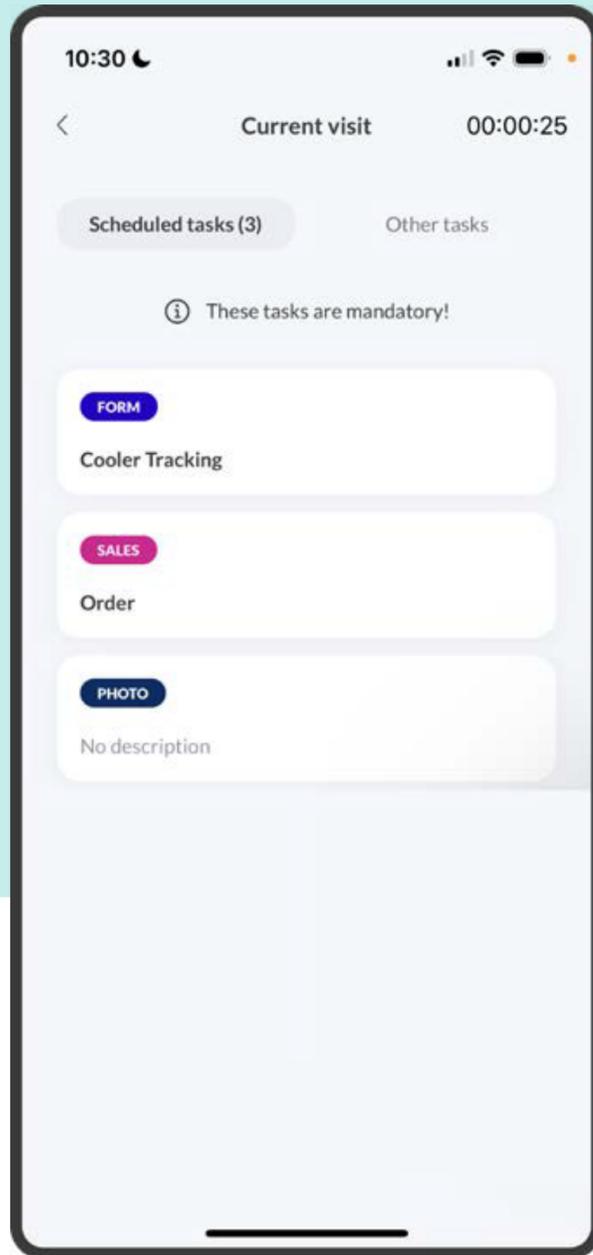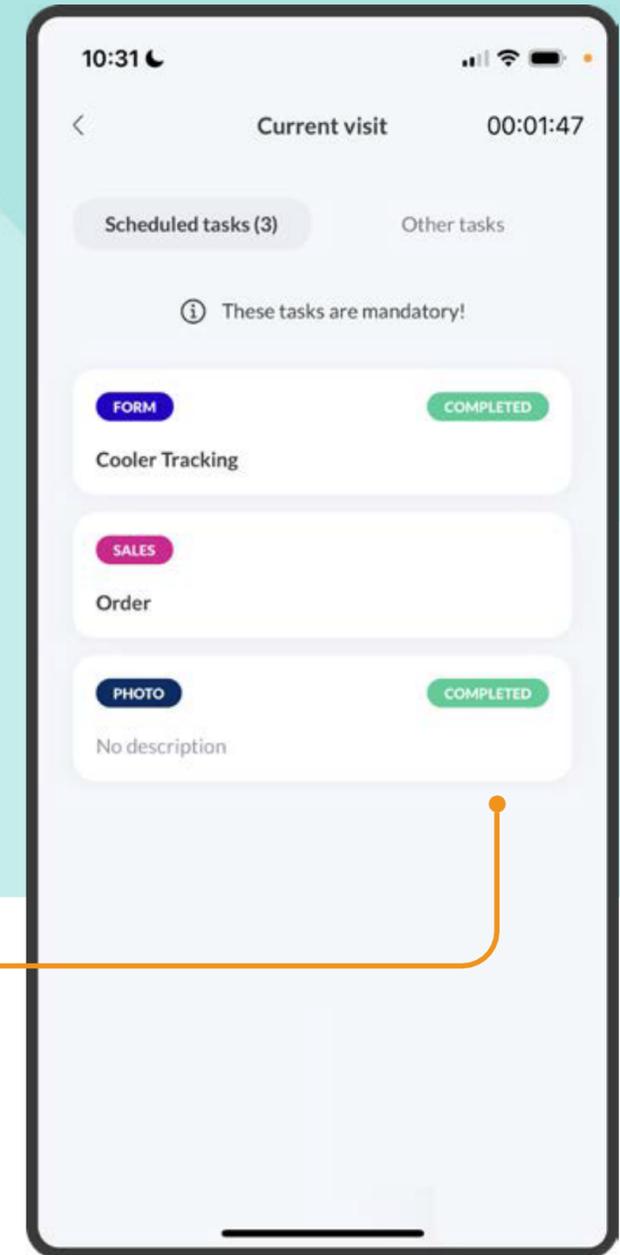
3 By clicking on a scheduled tasks, you can start completing them.

**4** You won't be able to check out until all mandatory tasks are completed.

5 By completing a task, the label COMPLETED will appear like seen above. Once all tasks are completed, you'll be able to check out.

HOW TO FILL OUT A FORM

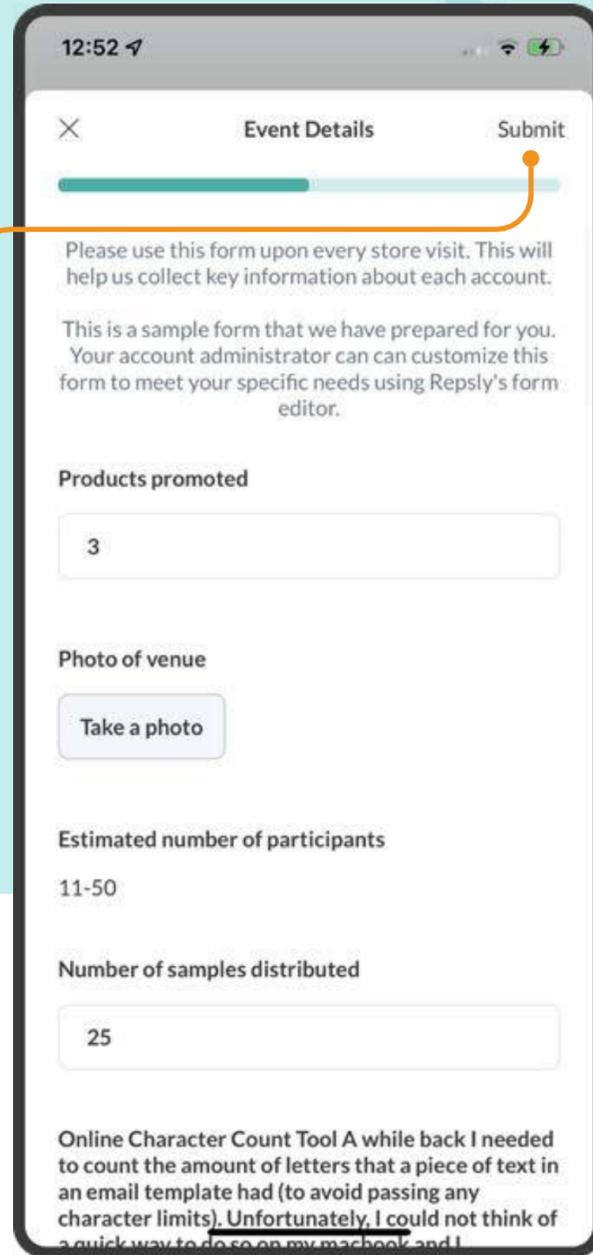Forms are the perfect way for you to capture data and store-level insights.

1 Choose the place for which you wish to fill out the form from your list of places.
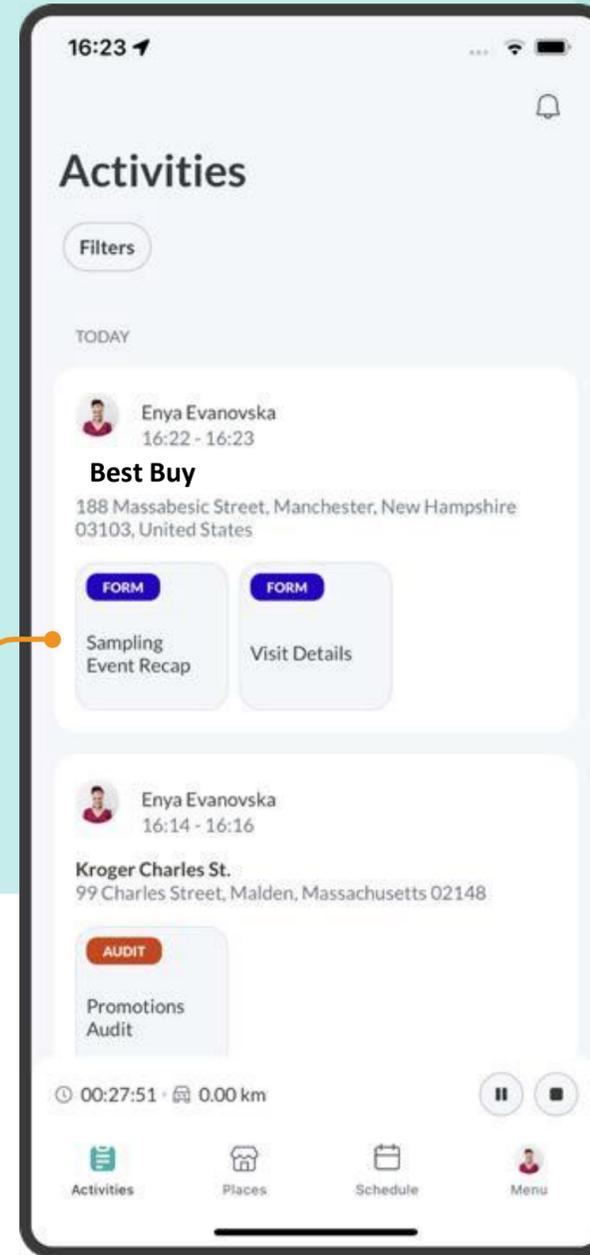
2 Tap on the CHECK-IN icon and select the FORM option.
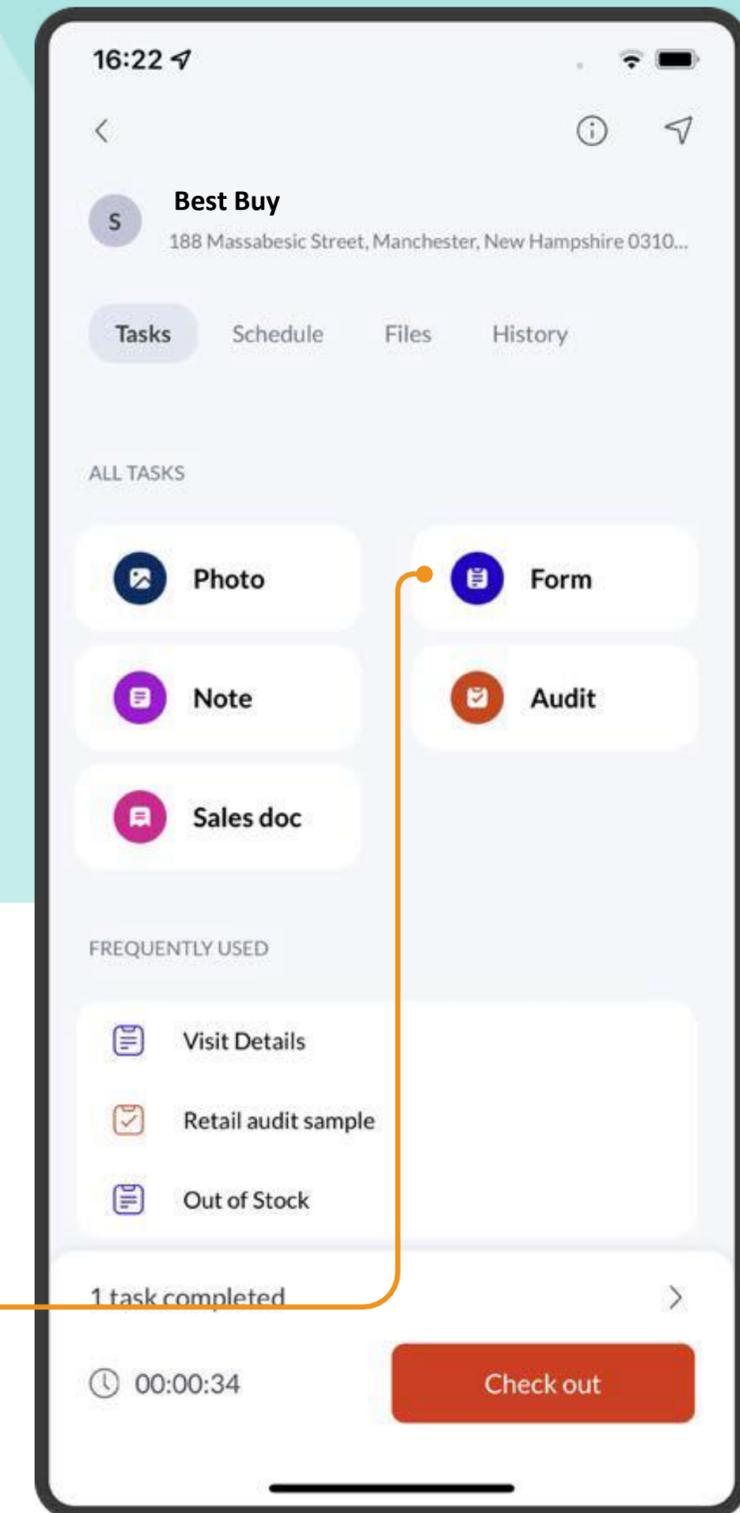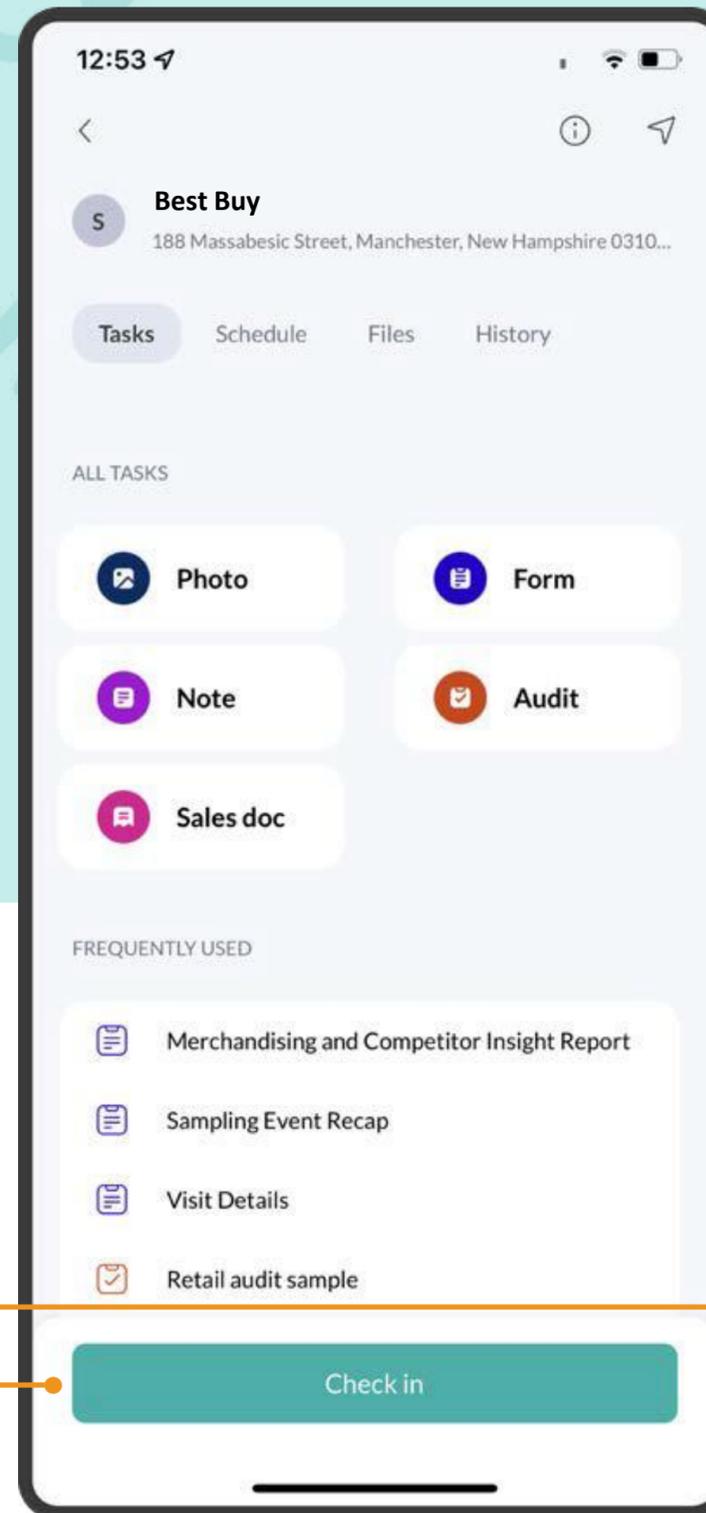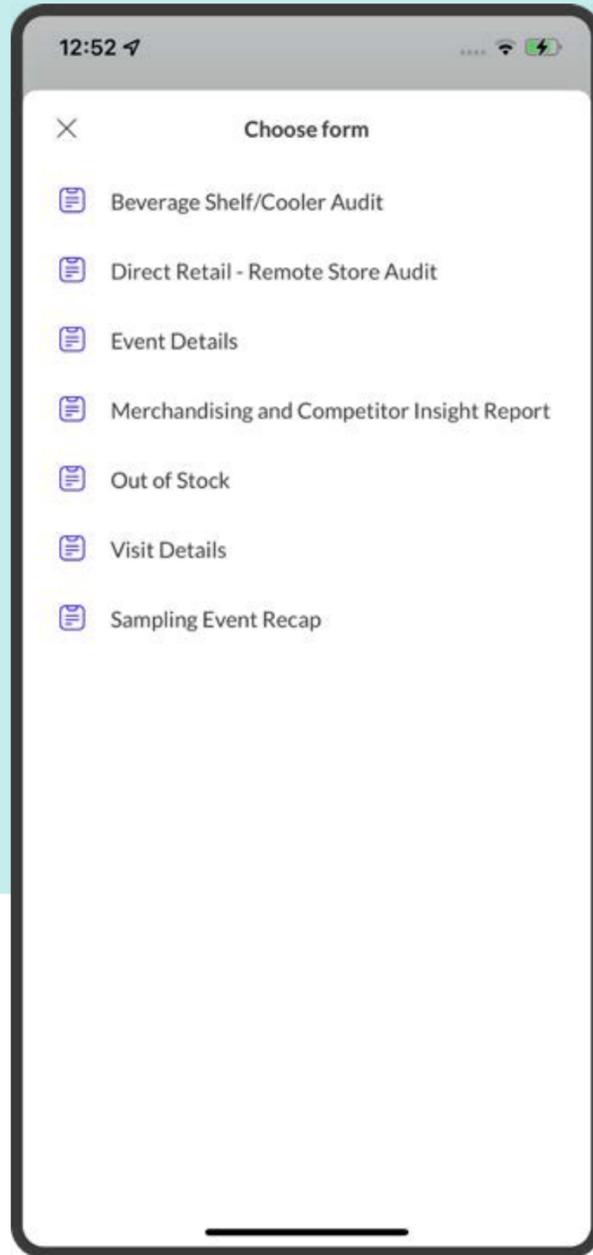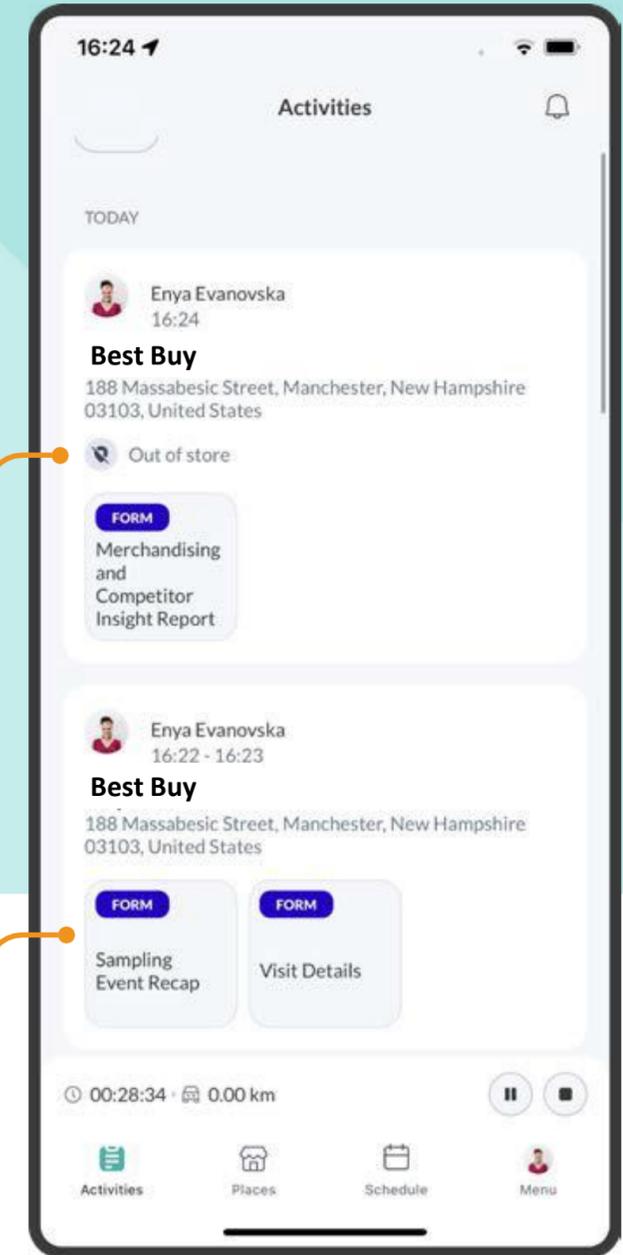
3   Choose the appropriate form.

4   Fill out all the necessary fields on the form. Tap SUBMIT when you're finished.
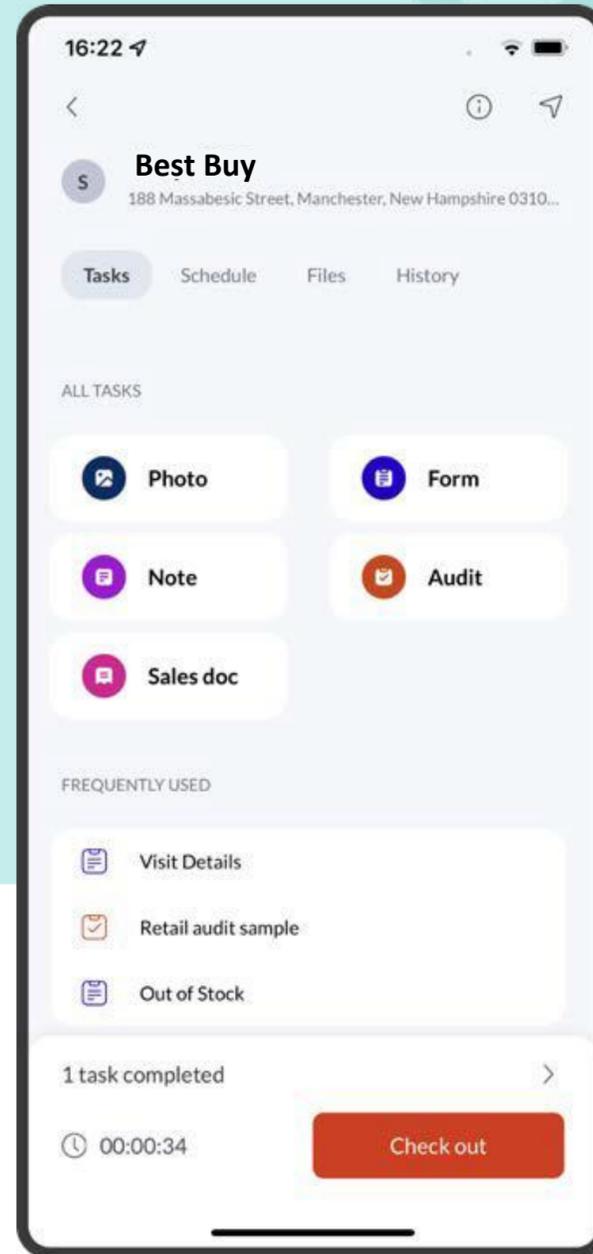
5   You'll now be able to see the completed form on the Activities page.
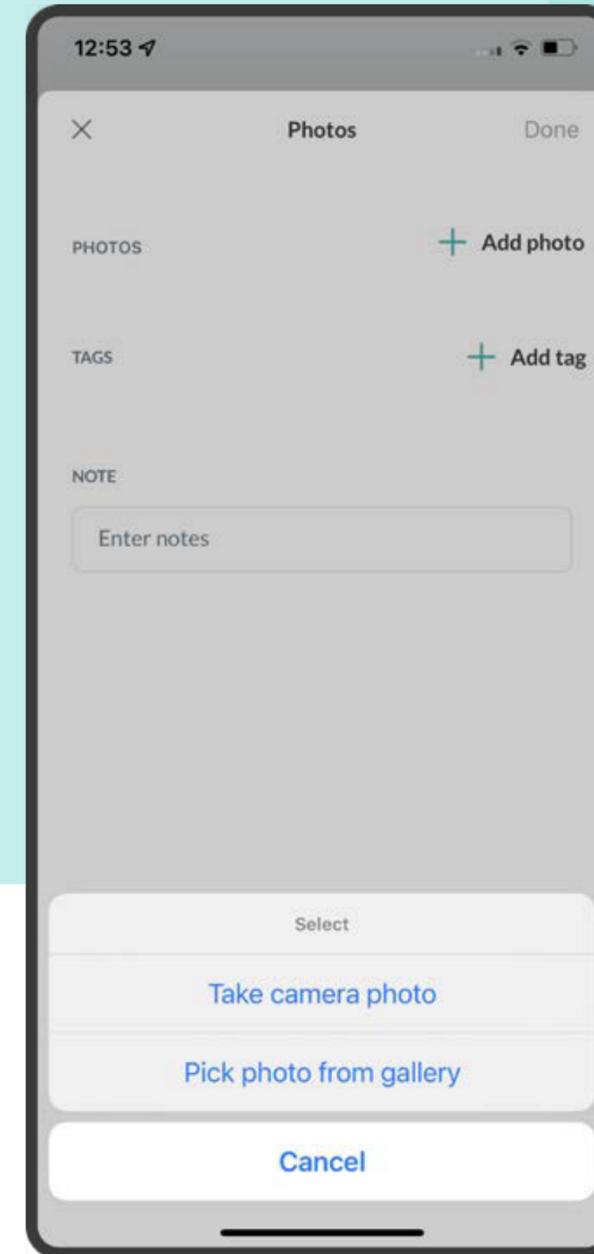
6   The *Out of store* indicator shows when Forms are submitted without checking in to the place.
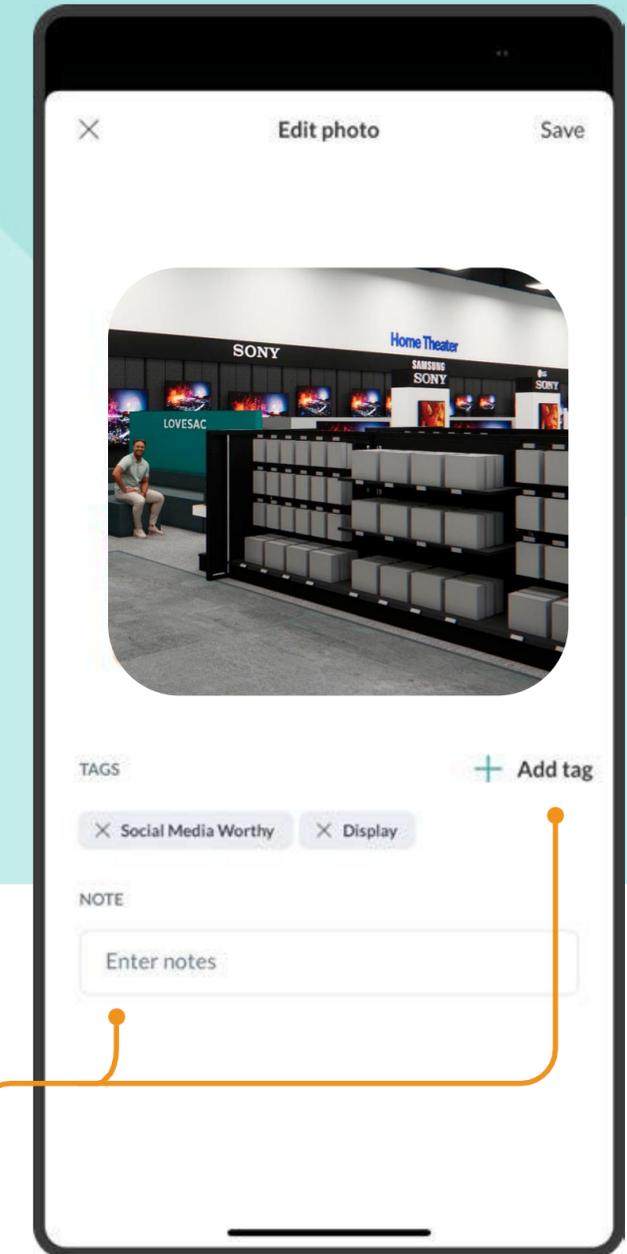
HOW TO TAKE A PHOTO

Capture photos, tag, and share them directly from the field for immediate visibility into your accounts.

1 Check into a place using the CHECK-IN icon, then tap on the PHOTO.

2 Take a photo with your device's camera or upload a photo from your gallery. Tap to submit a photo, or press and hold to select and upload multiple photos at once.
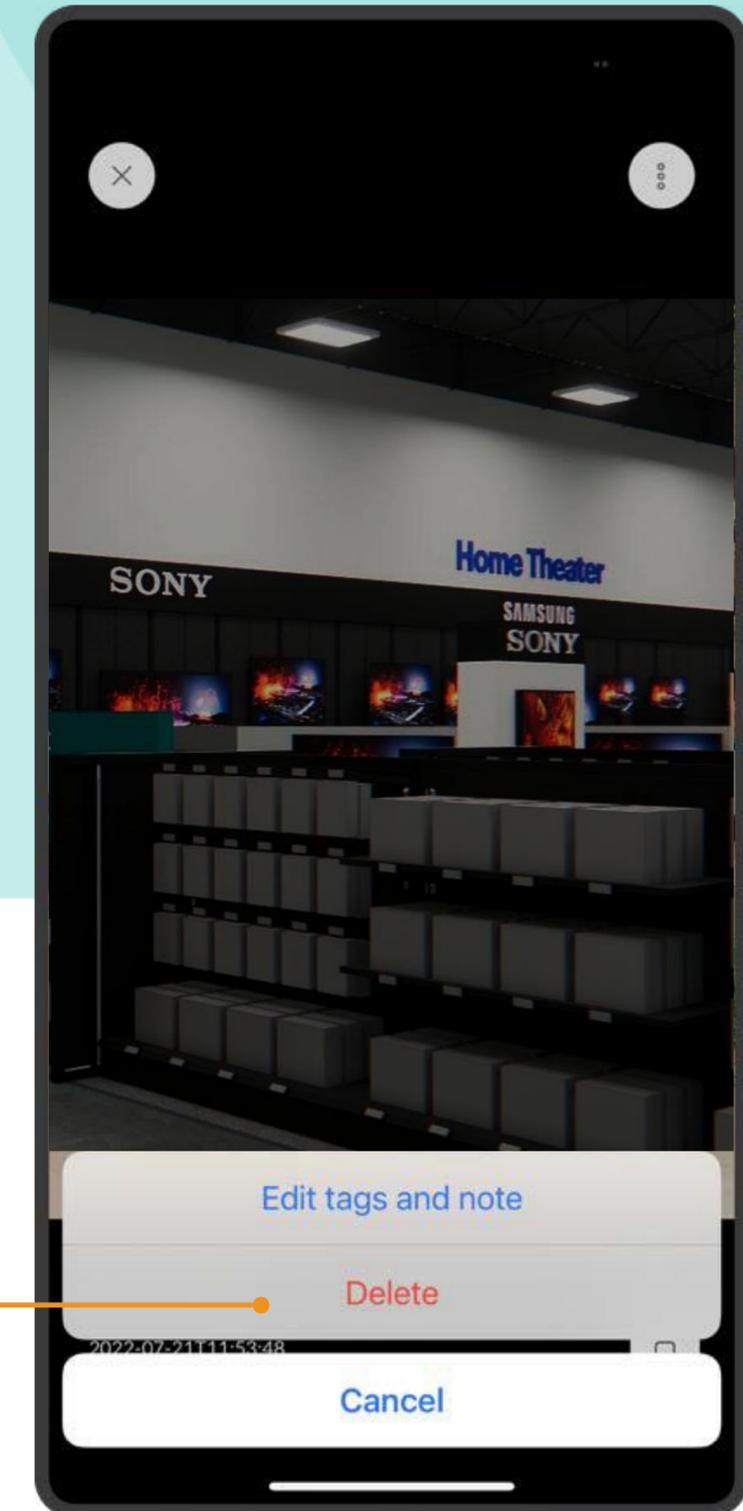
3 Add tags for easier photo organization or include additional notes. When you're done, tap SAVE to submit the photos.

HOW TO DELETE A PHOTO

If you have accidentally submitted a photo, you can easily delete it.

1   Open the photo you want to delete and click on the THREE DOTS at the top right corner.

2   Click on DELETE to confirm your action and your photo will be deleted.
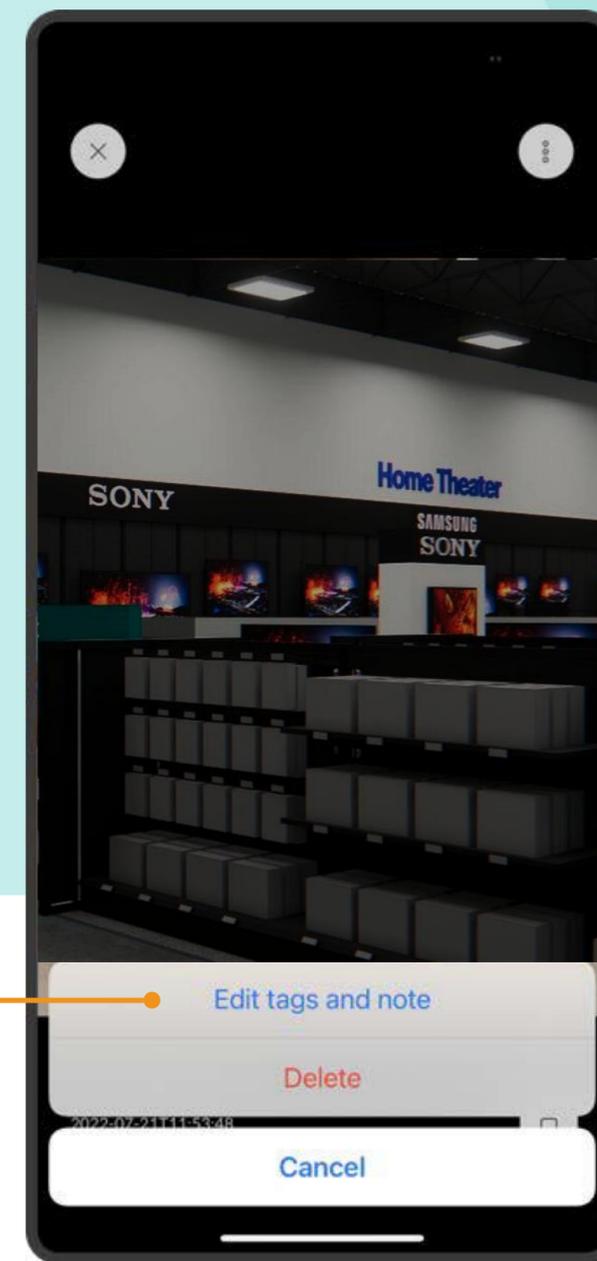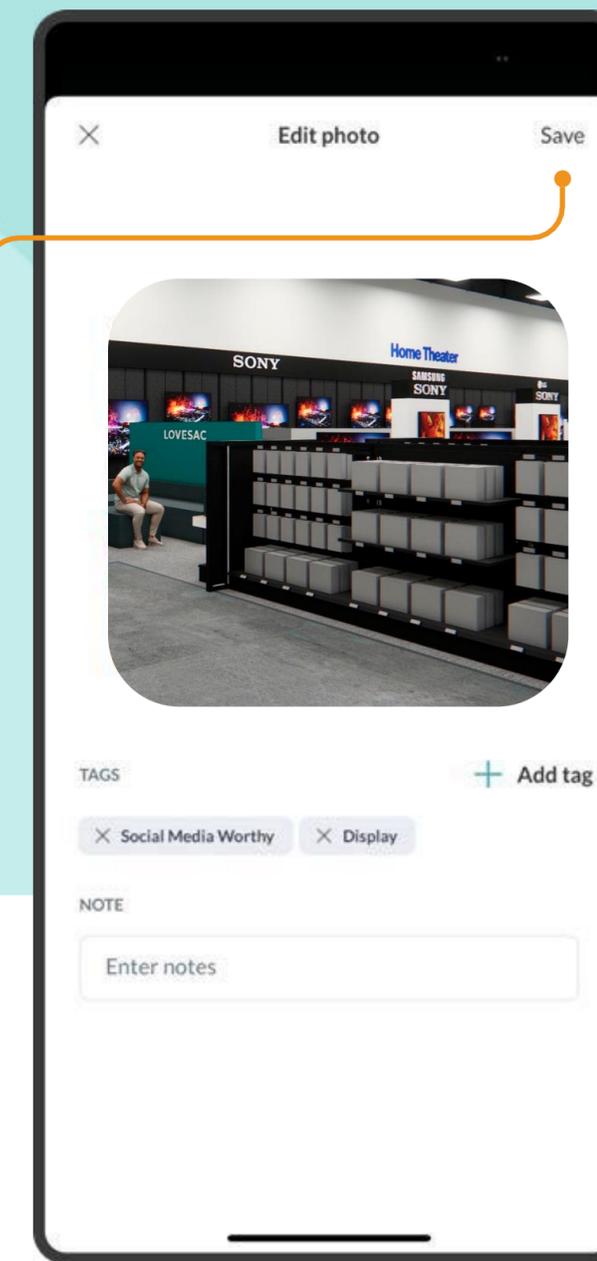
HOW TO ADD OR EDIT PHOTO TAGS

You can add notes or tags to photos while out in the field, or even after the photo is submitted to Repsly.
Tagging helps your team filter through submitted photos and find what they need.
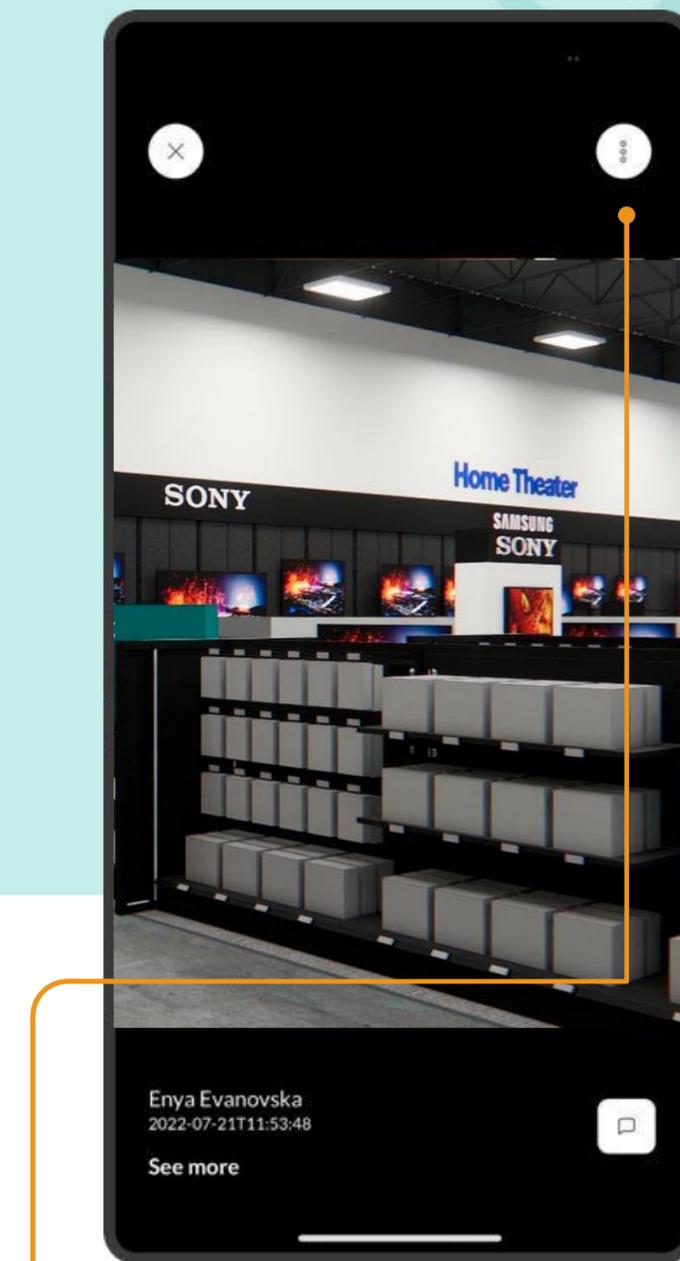
**1** Open the photo you want to edit and click on the THREE DOTS at the top right corner.

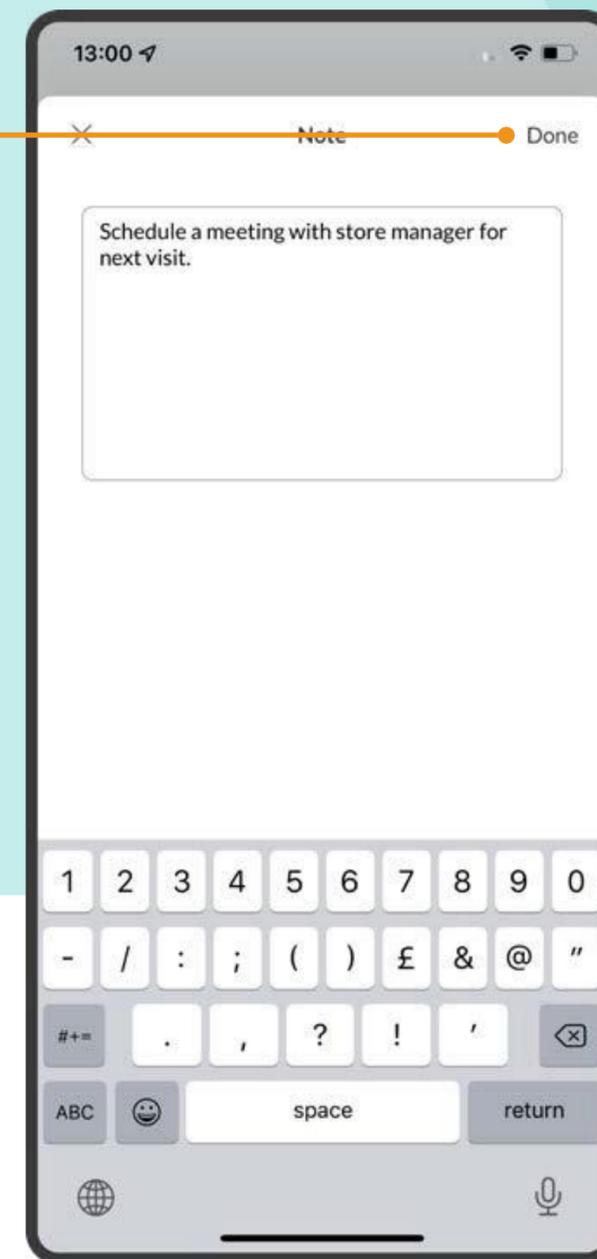**2** Tap on EDIT TAGS AND NOTE to confirm your action and start editing.

3 Once you're done with making changes, tap on the SAVE.
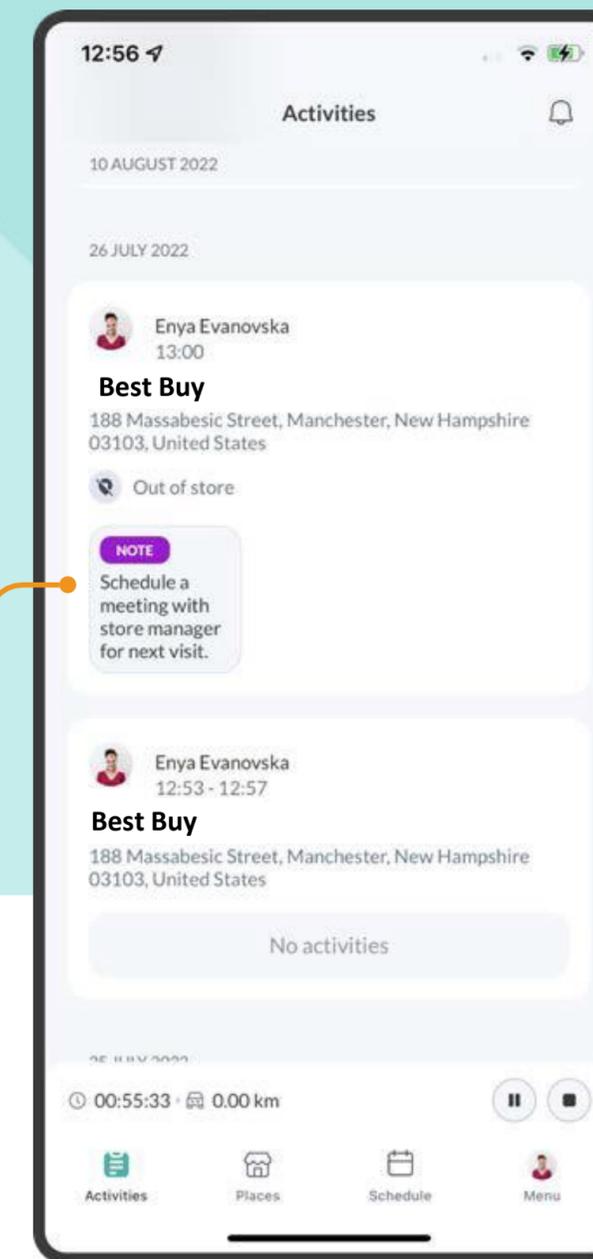
HOW TO SUBMIT A NOTE

Use notes to capture observations or follow-ups during a store visit. Notes are handy to refer back to so you can quickly get caught up on what recently happened at a place.
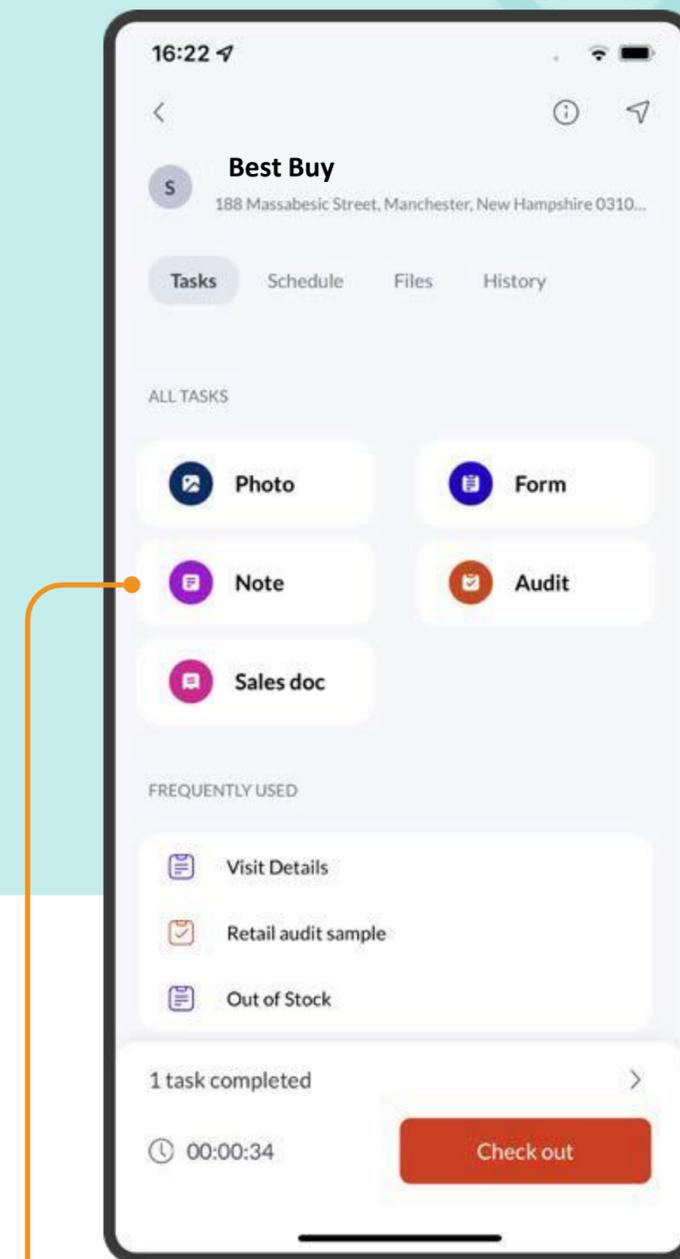
1 Check in to a place, then tap on the NOTE button.
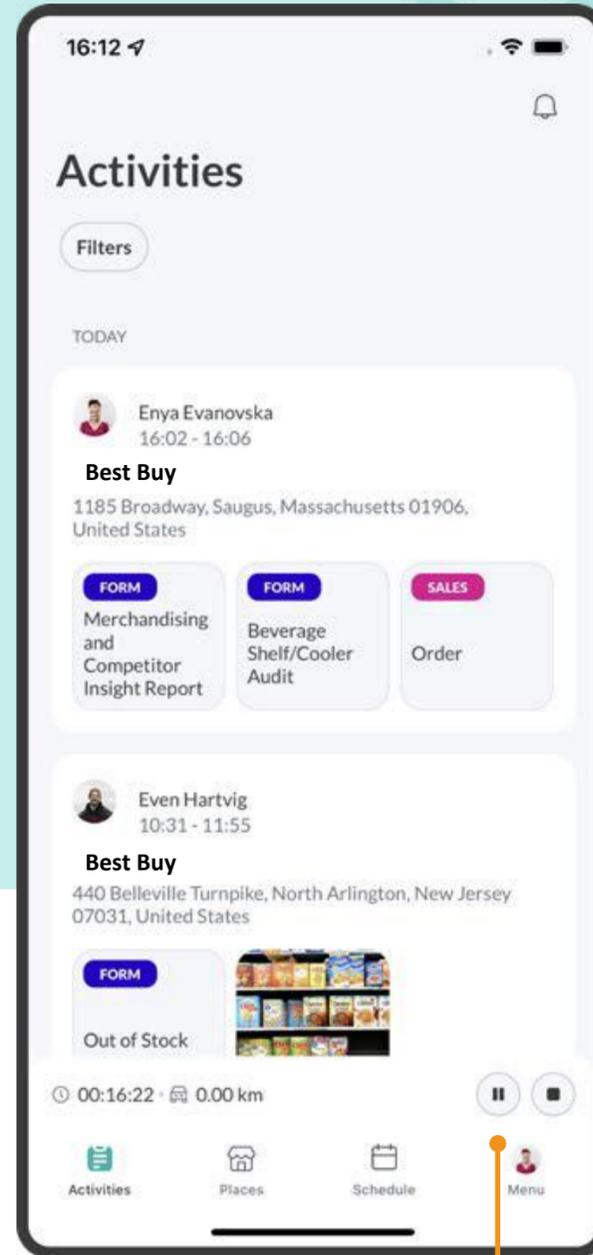
2 Write your note and tap DONE to save.

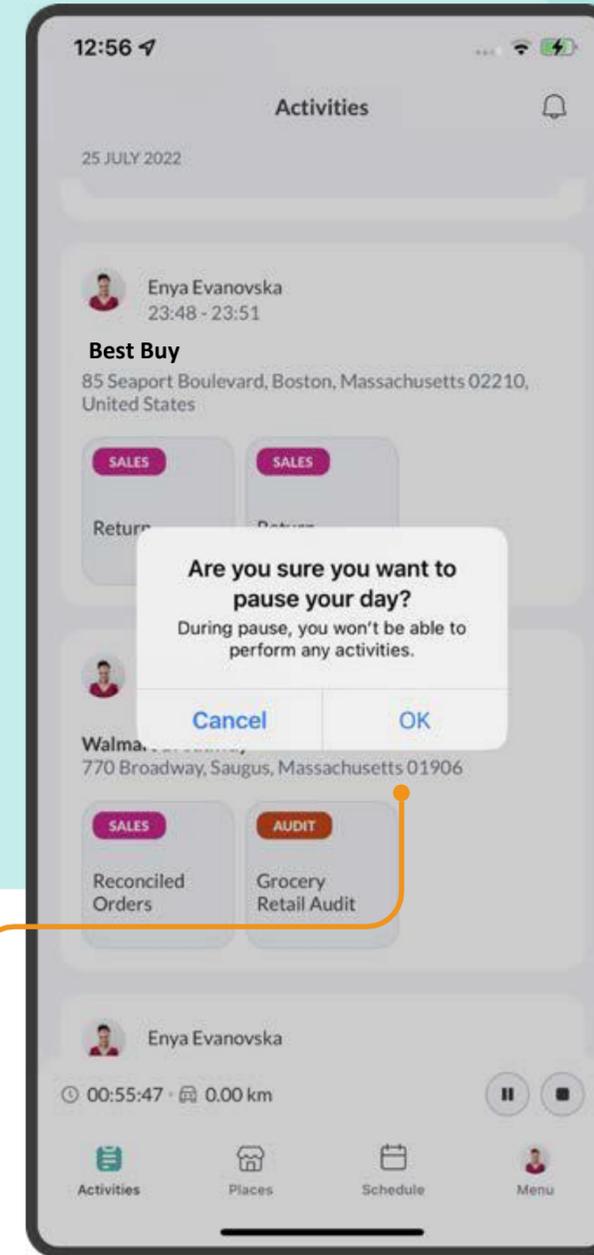**3** You can also EDIT your submitted notes by opening a note and clicking on edit in the right corner.

HOW TO PAUSE YOUR DAY

Pausing your day tells Repsly you're taking a break, so we'll stop calculating your work time and mileage traveled until you resume your work.
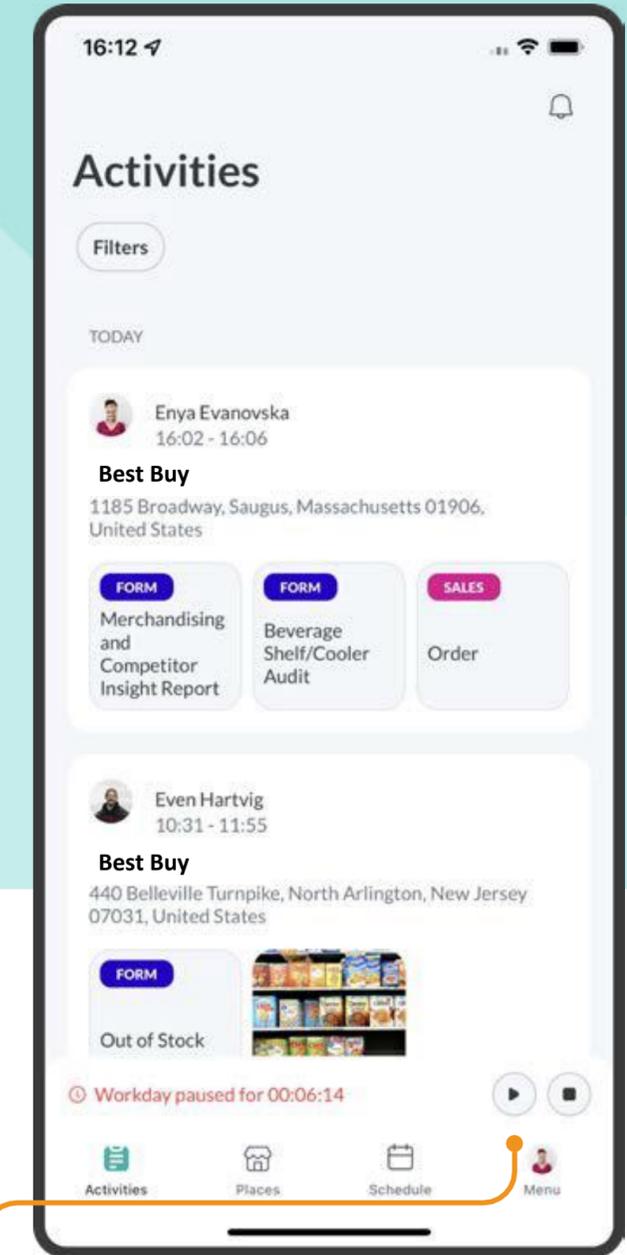
NOTE: You cannot pause your day while checked into a place.

1 Tap PAUSE.

2 Confirm you'd like to pause your workday.

3 Tap the PLAY icon to resume your workday.

HOW TO CHECK OUT

Once you've completed all the tasks during a store visit, you'll need to check out to signify the visit is done and stop the visit clock.

NOTE: If you don't check out from a store, you will see a red dot at the Places icon that will remind you that you're still checked in.

1 Tap on the CHECK OUT button at the bottom of your screen.

**2** Tap YES to confirm you want to be check out.
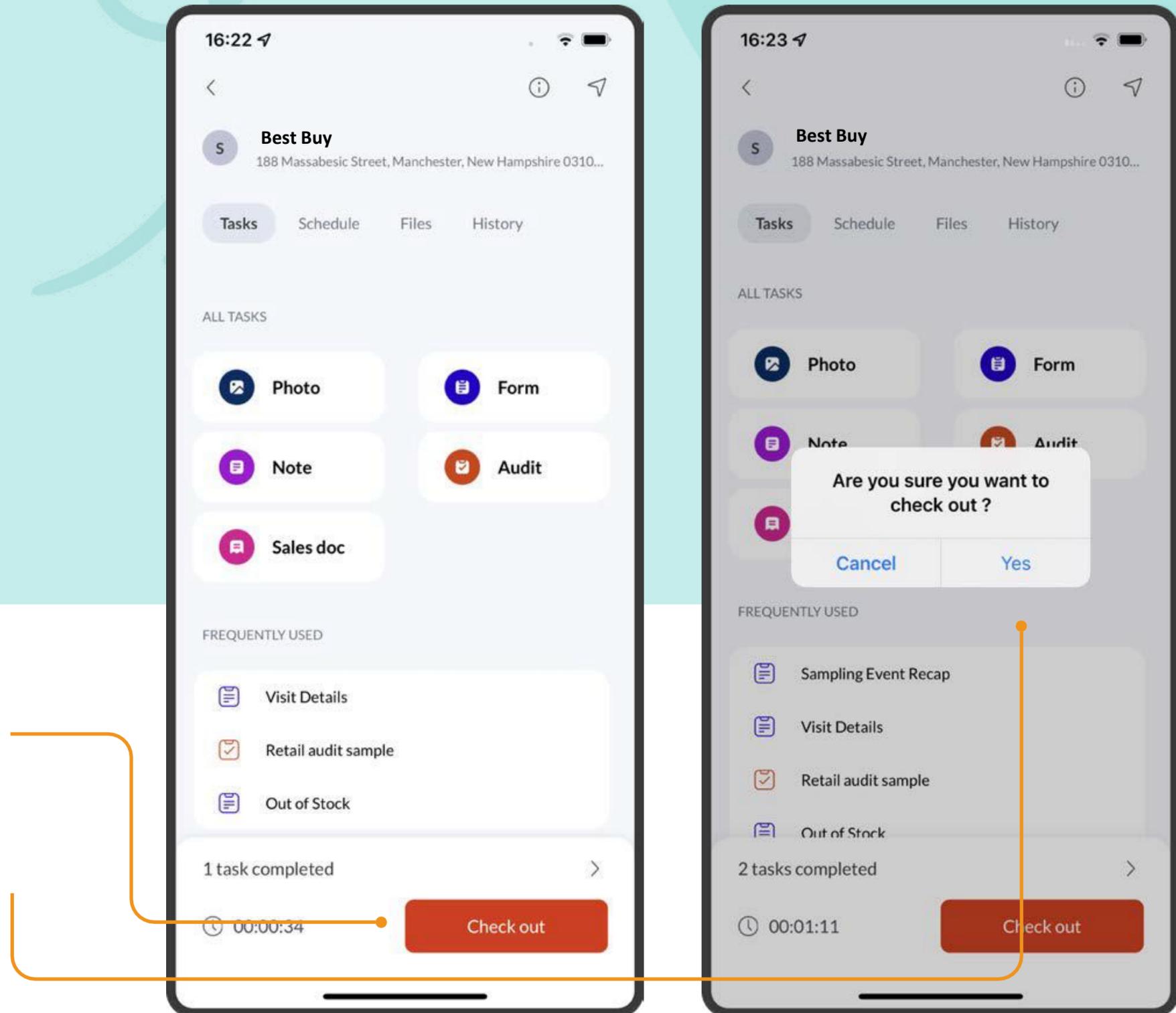
HOW TO END YOUR DAY

End your day to stop tracking time and mileage and automatically submit your workday details to your manager. Once you end your day, you cannot restart it.

NOTE: Repsly will automatically end your day if you haven't done so by midnight, but will not submit time and mileage data.

1 Tap STOP in the bottom right corner.
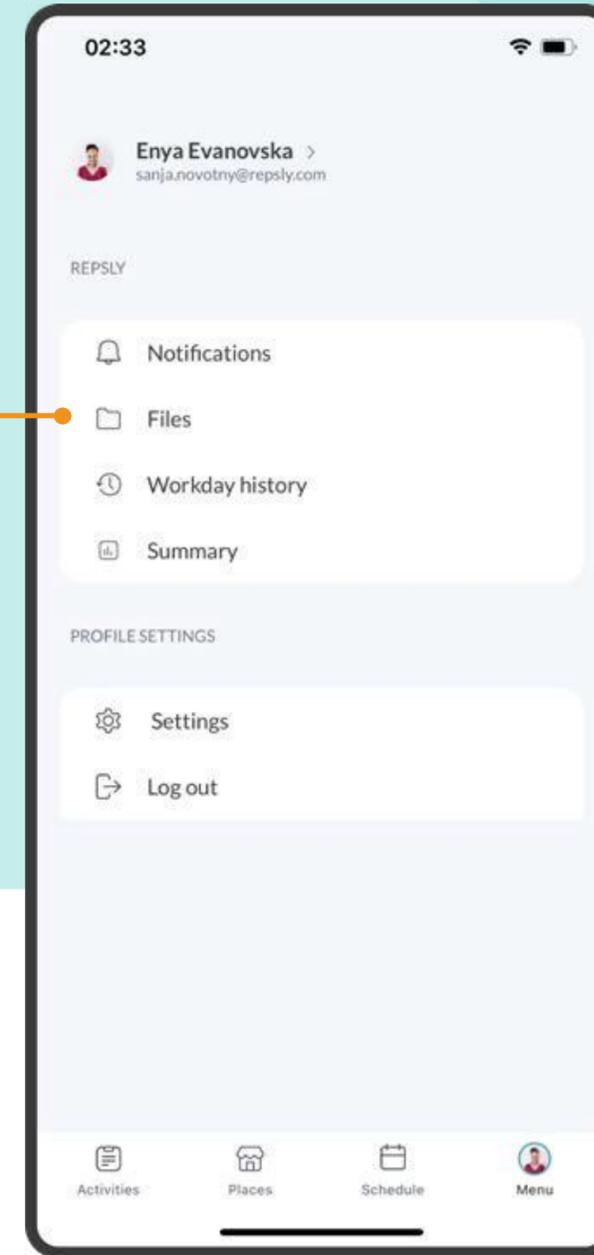
2 Tap END DAY to confirm.
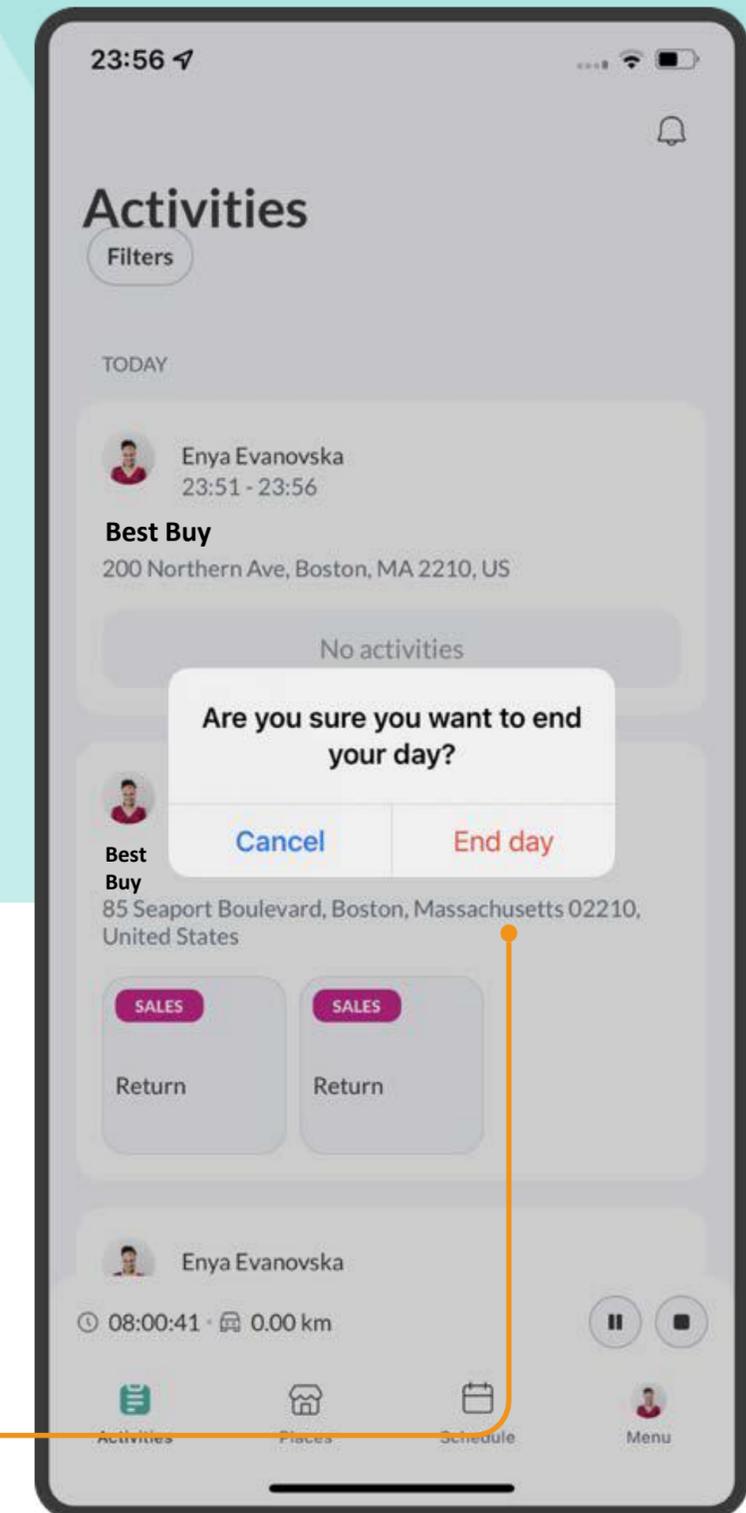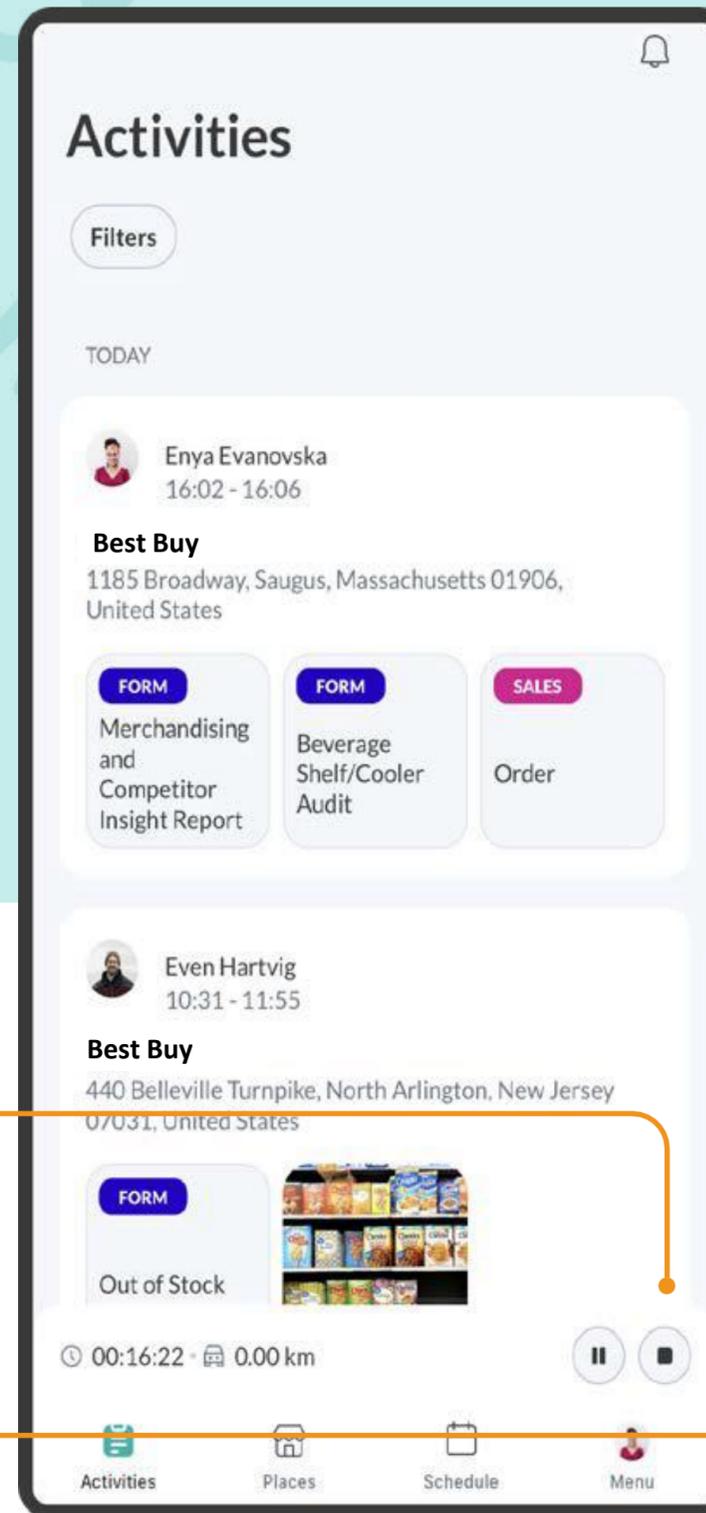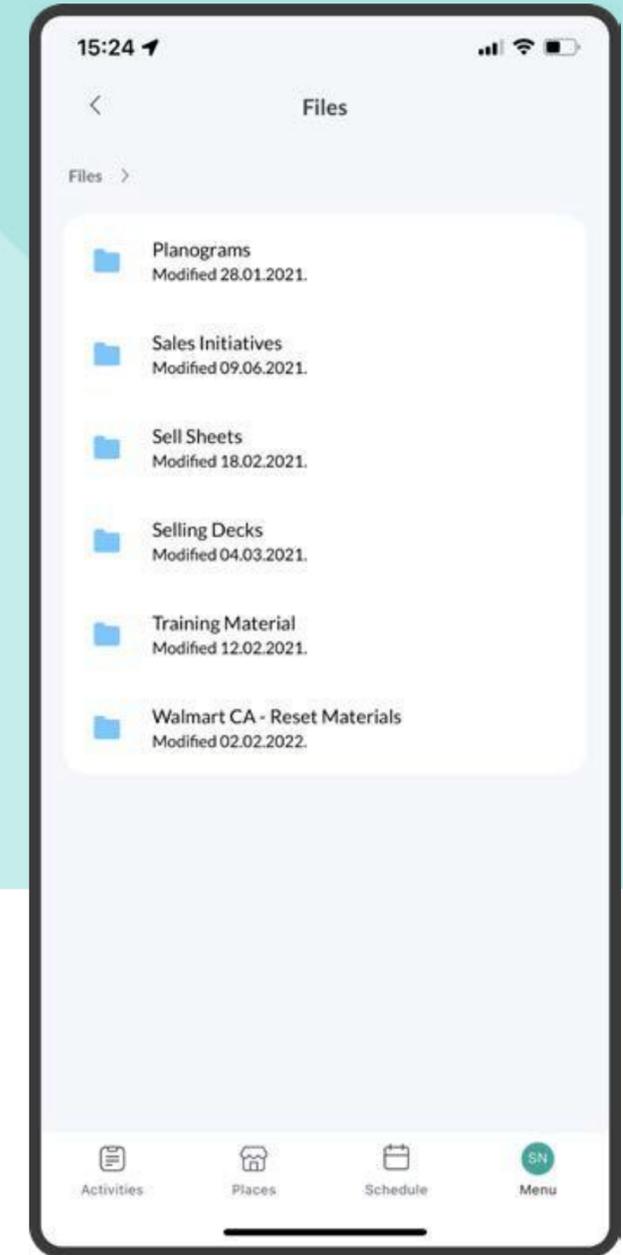
HOW TO ACCESS FILES ON THE GO

The Repsly app gives you access to all the files you need to win in your accounts. You can browse all files in the document library, or quickly find key files assigned to specific places.
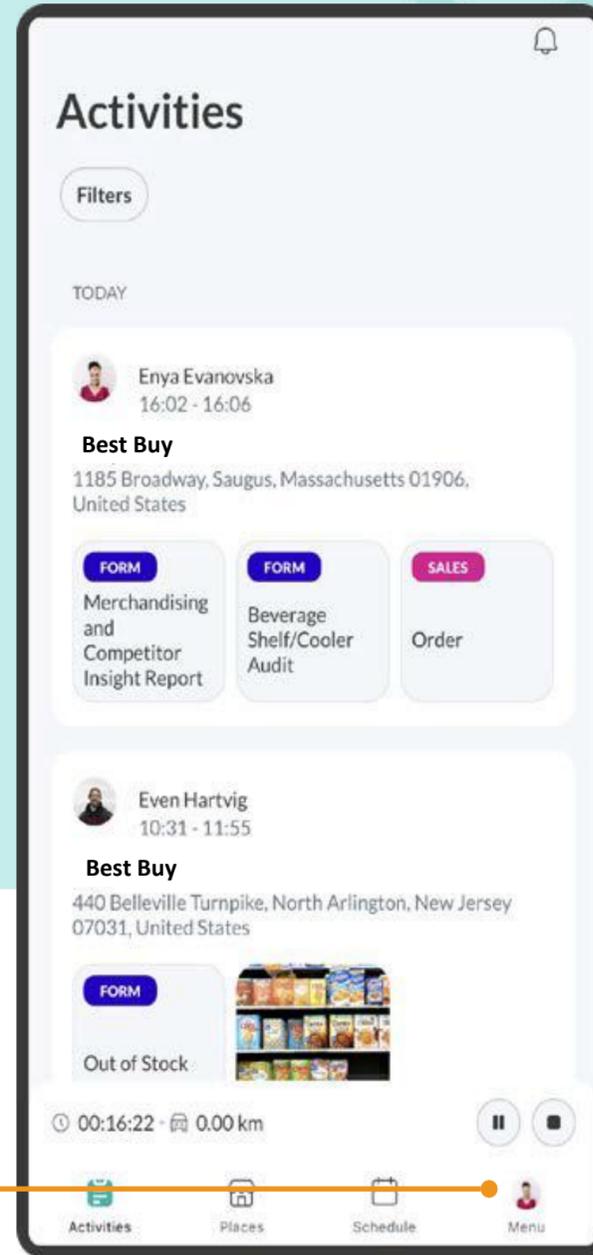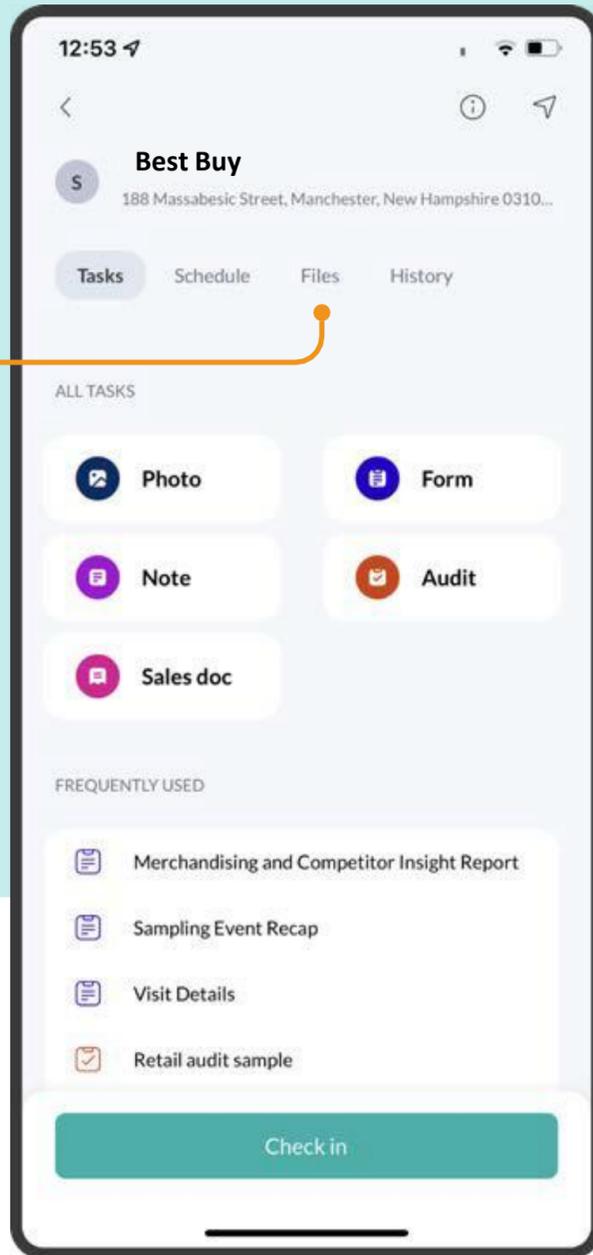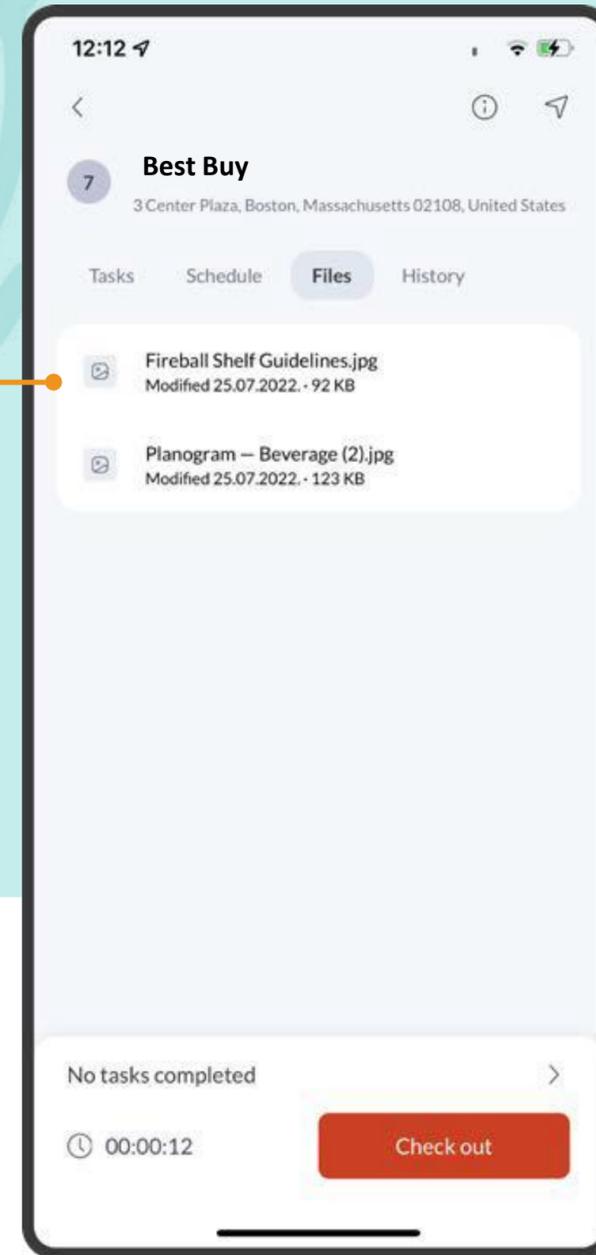
1 Click on the MENU icon.

2 Select FILES and select the materials you need. Here, you can review all the files available to you.
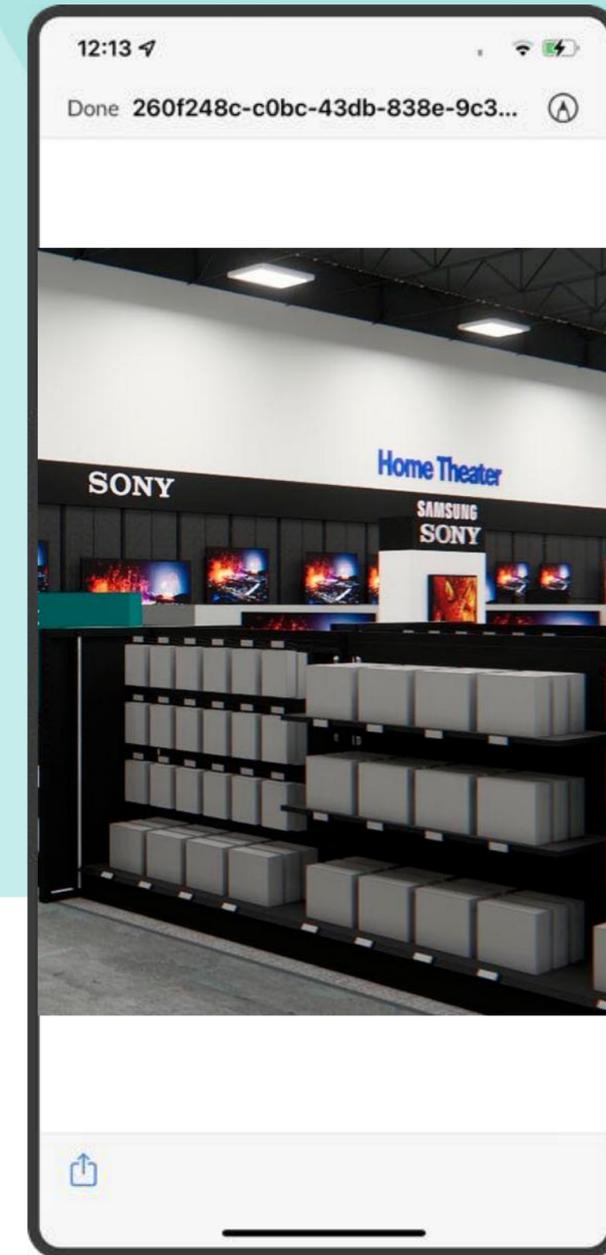
3 To find key files assigned to specific places you need to select a place. Tap on the FILES.
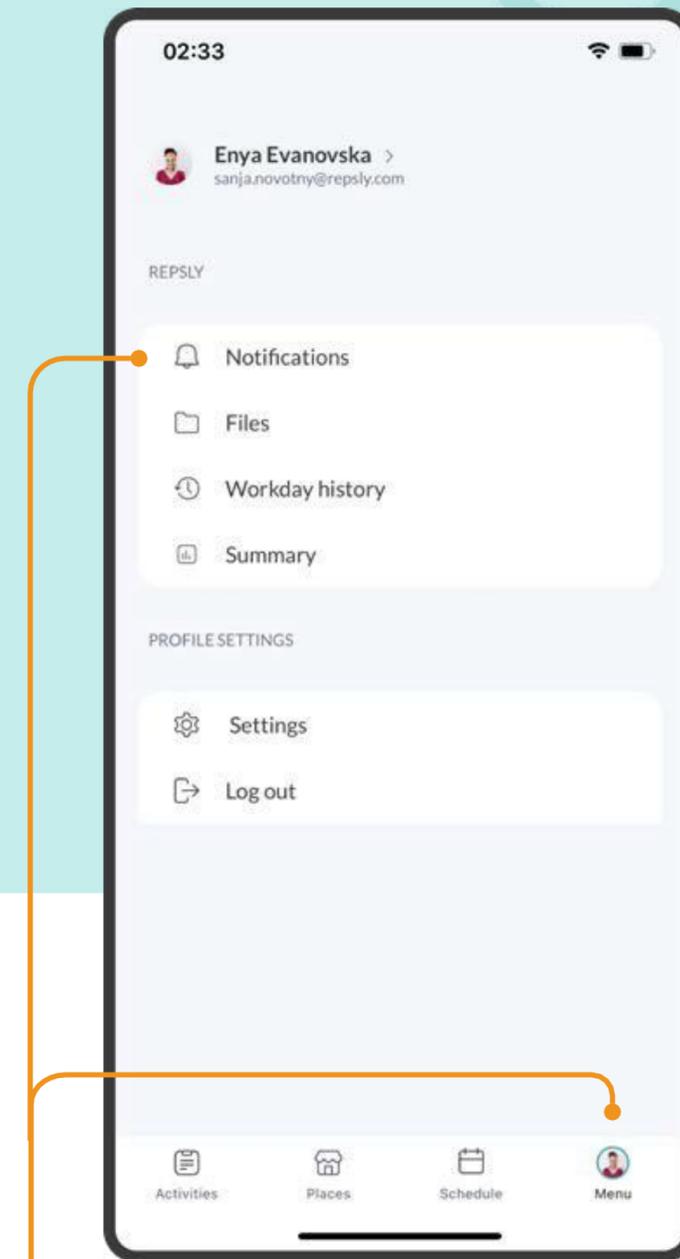
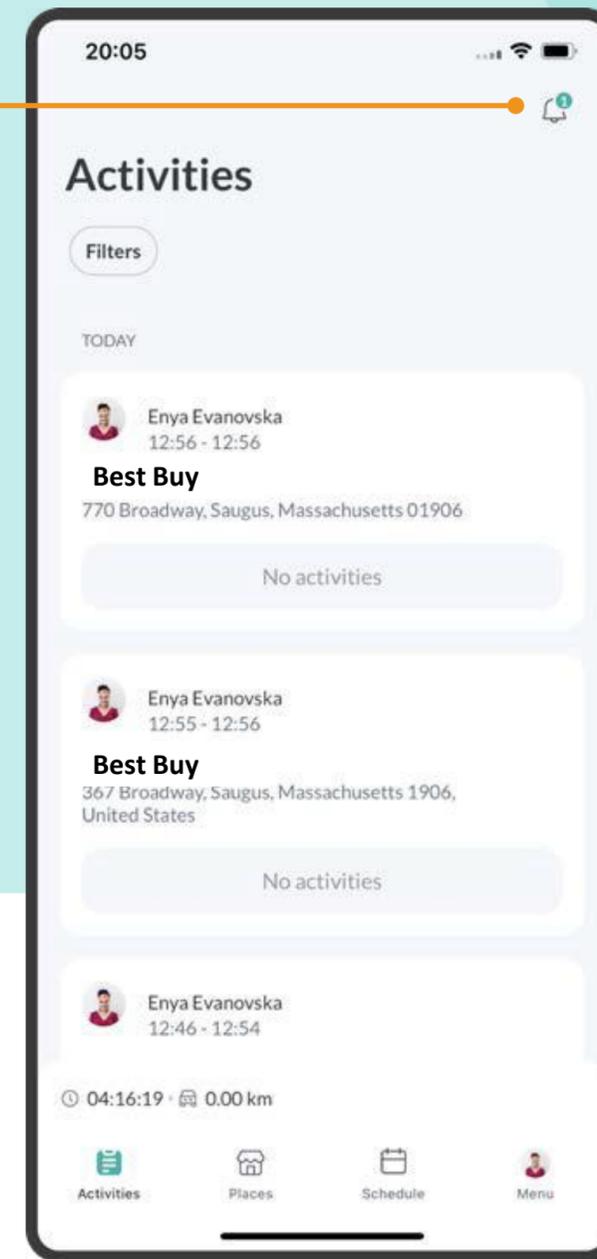**4** Select the attachment you need to complete your visit.
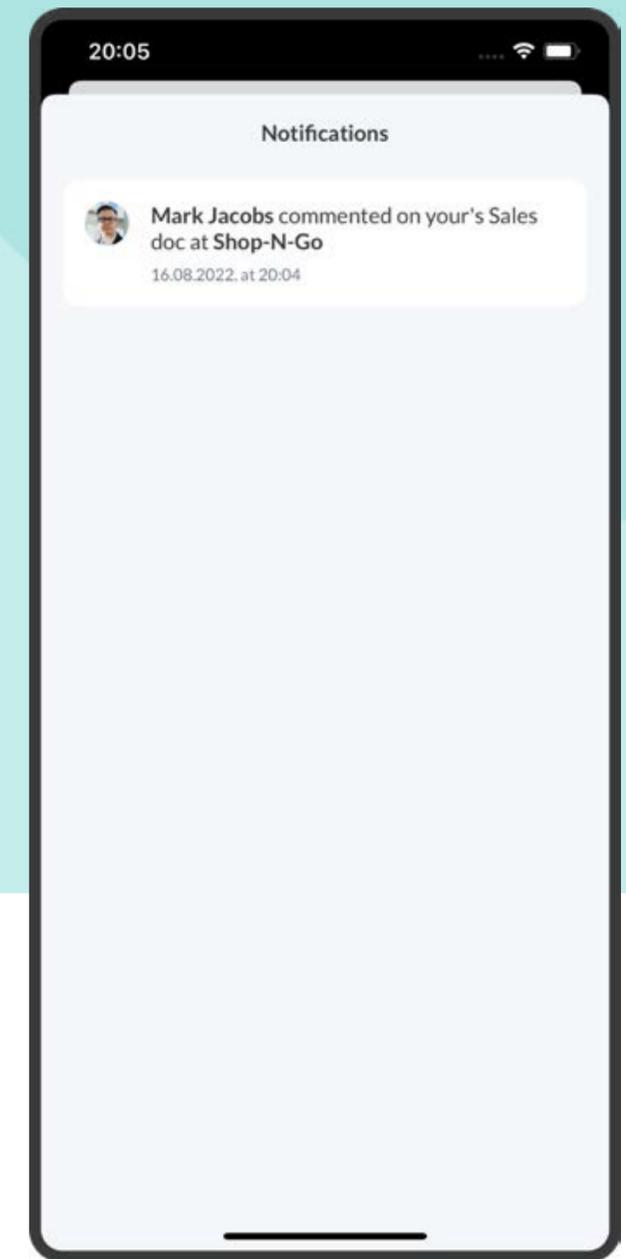
HOW TO VIEW YOUR NOTIFICATIONS

You will receive a notification any time one of your team members comments on one of your activities.

1 A red dot will appear on the MENU icon when you have a notification. Tap NOTIFICATIONS to see all unread notifications.
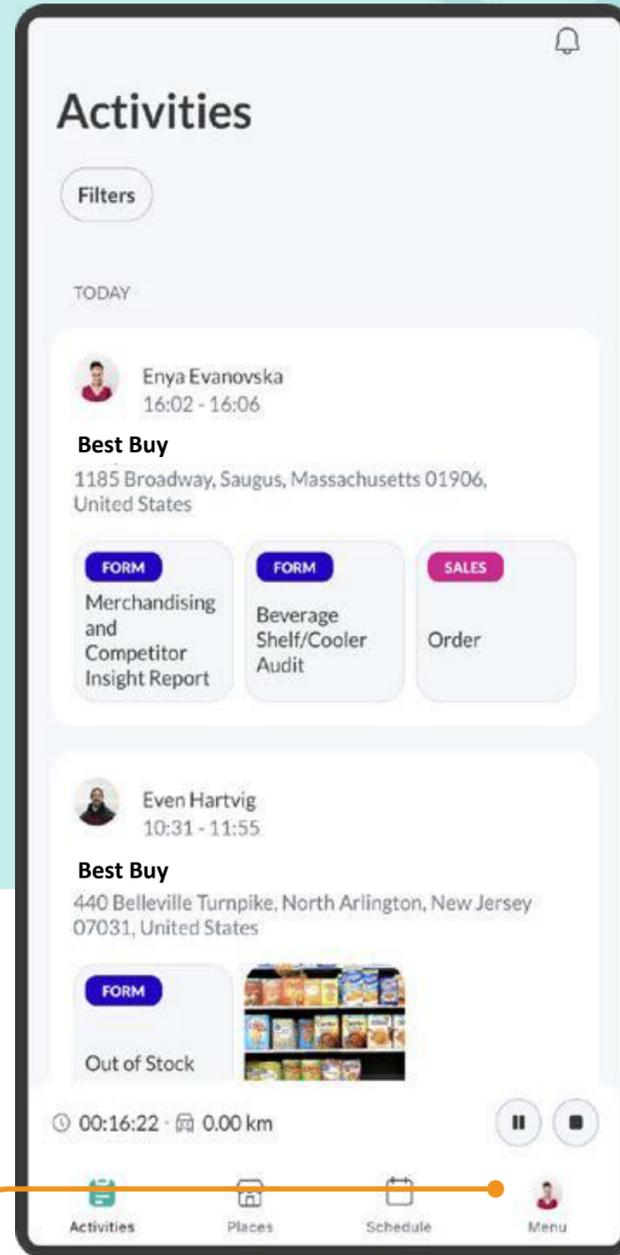
2 Or, tap on the BELL icon at the top right corner of the Activities screen to review your notifications.
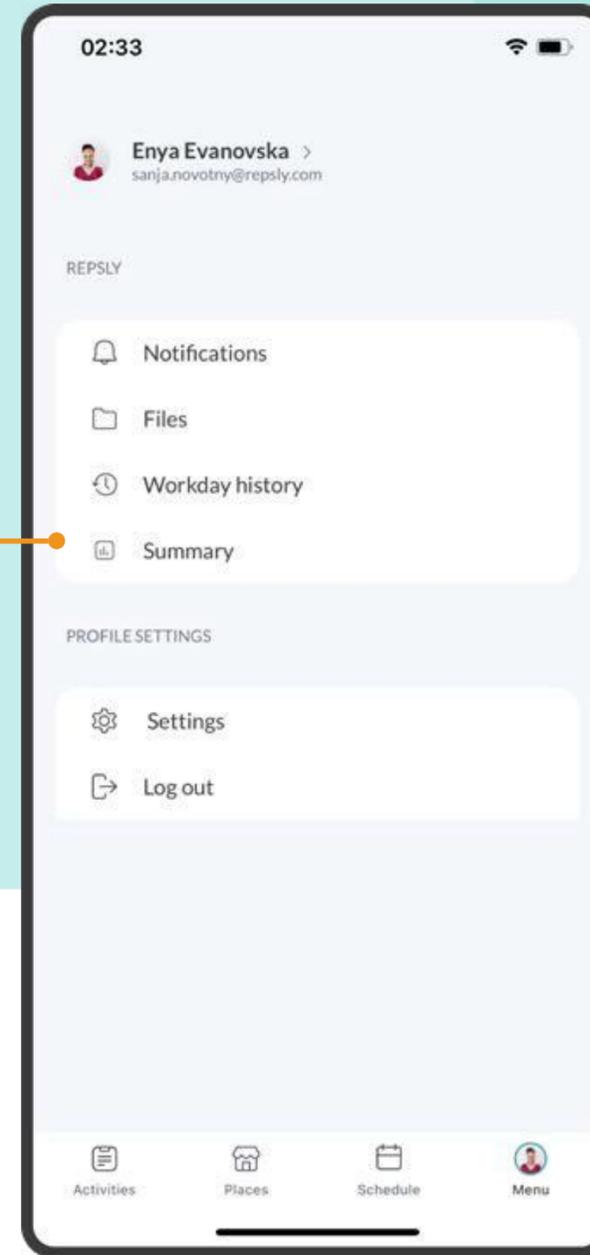
3 Notifications are listed with their details in chronological order.

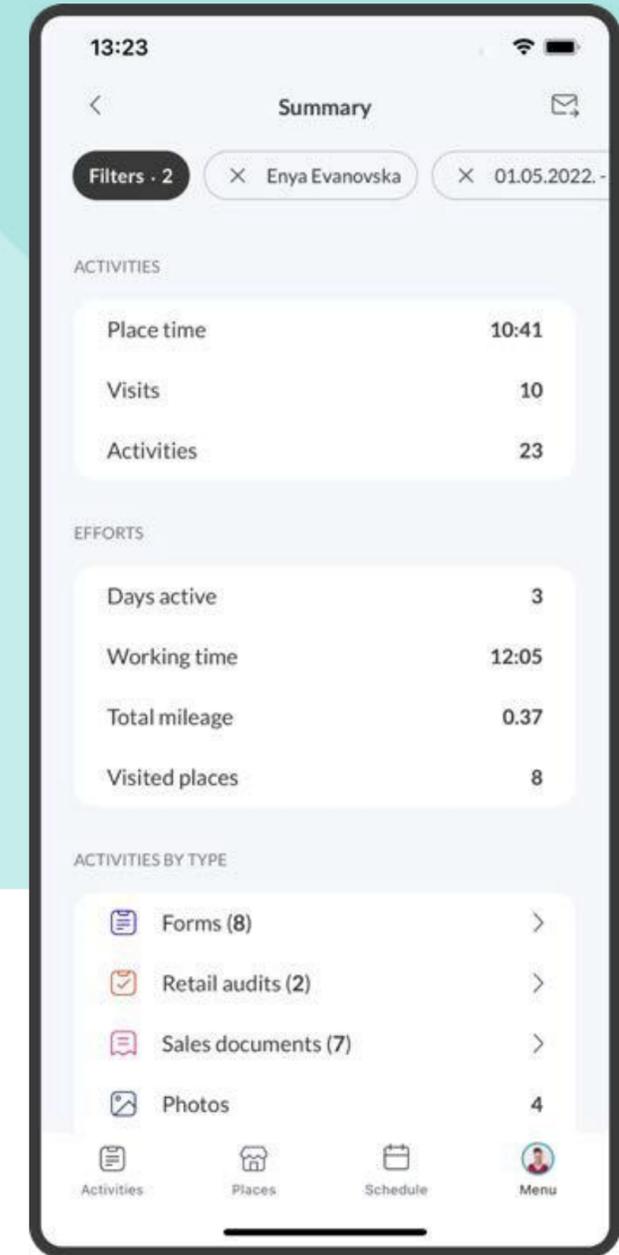# HOW TO VIEW A SUMMARY REPORT

The summary report shows you an overview of your performance, so you can track your work, review your performance and improve your results.
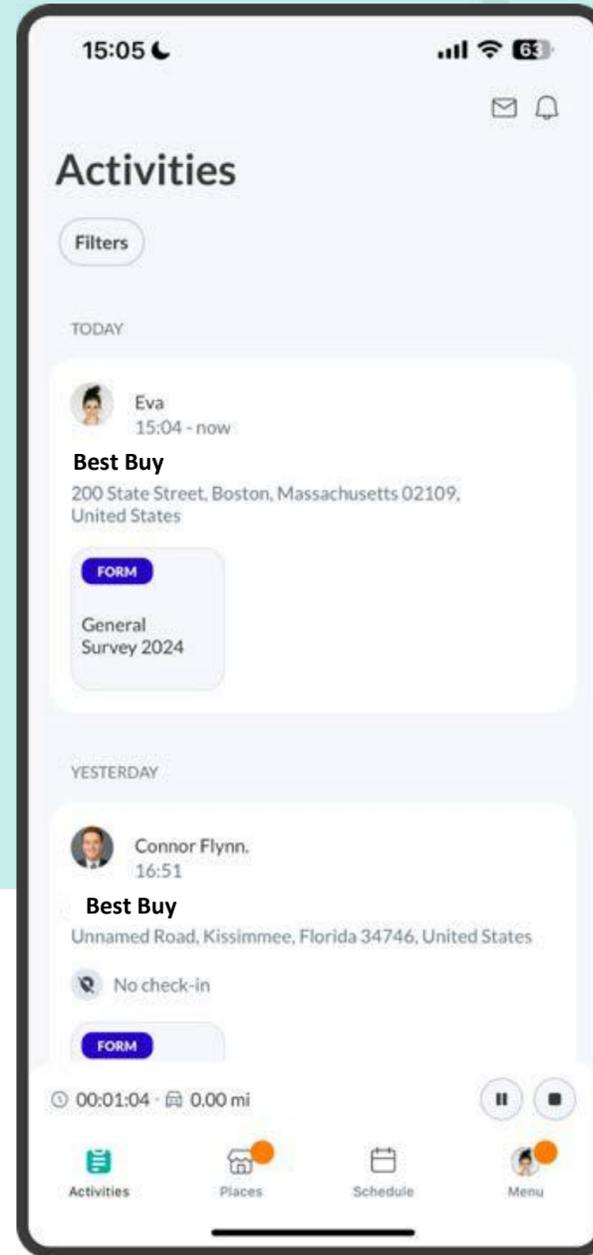
1 Tap on the MENU icon.

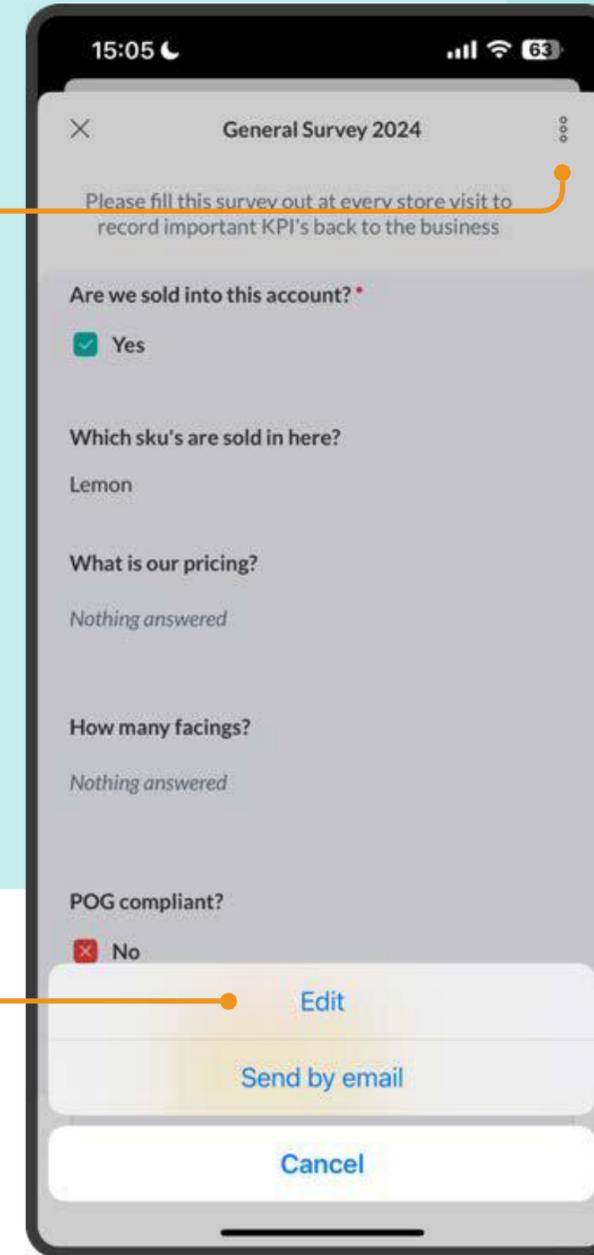**2** Select SUMMARY and review your reports.
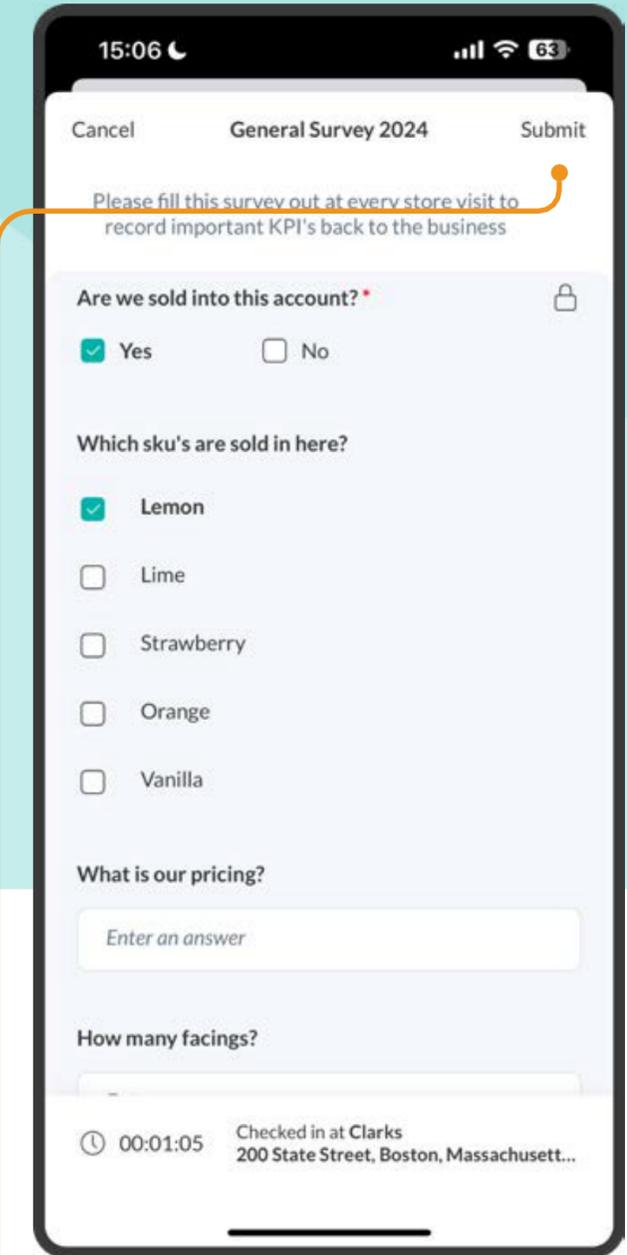
HOW TO EDIT SUBMITTED ACTIVITIES

Did you make a mistake or miss some information while filling out a form? No worries! We'll show you how to edit a submitted form. The process is the same for all editable activities, including forms, notes, and photo notes.
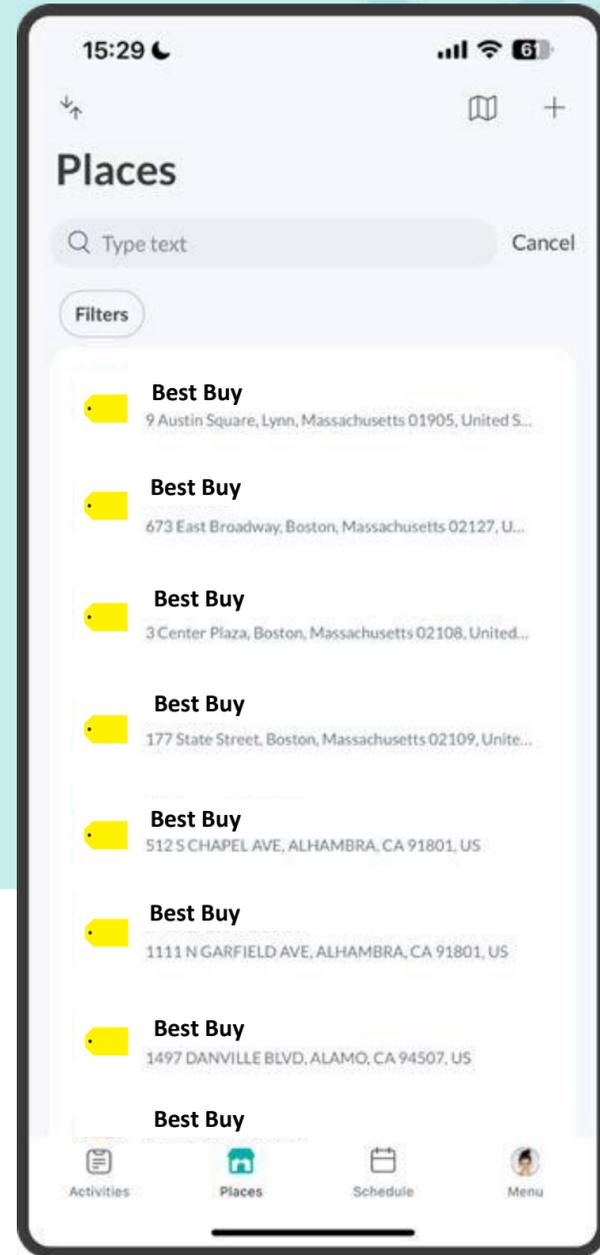
1 Find the activity you would like to edit. Click on it.

**2** Click on three dots in the right corner. Chose EDIT.

3 After you edit the certain answer click on SUBMIT button.
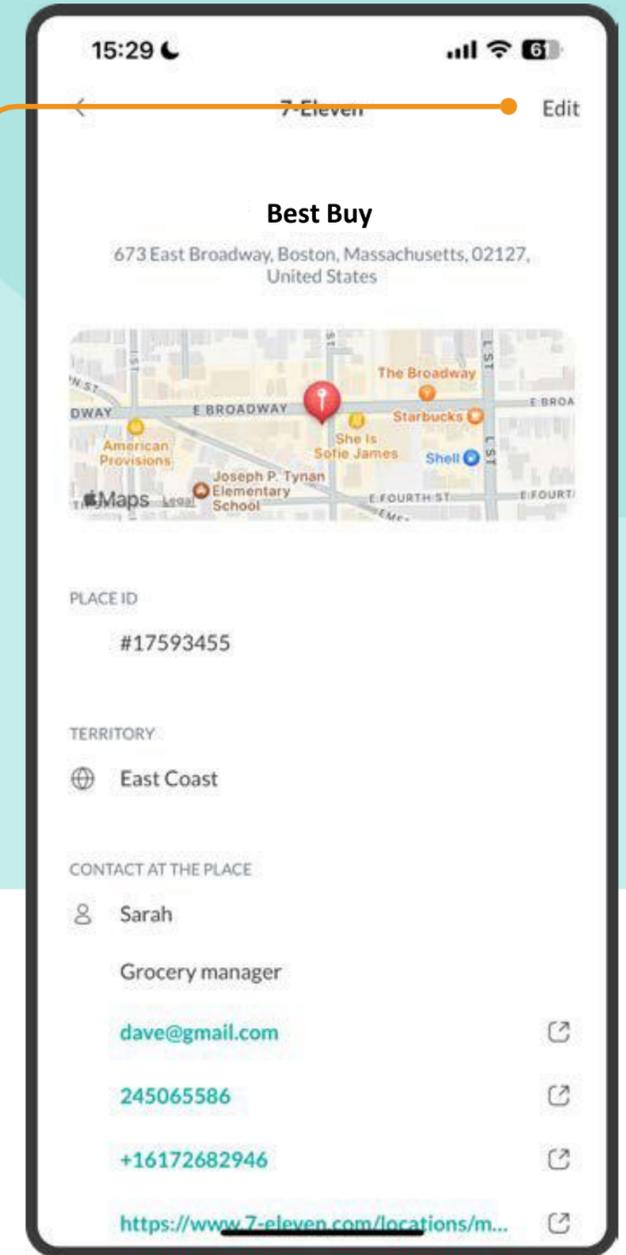
HOW TO FIND PLACE INFORMATION

The Contact tab contains all the contact information for a place, and allows you to easily access info such as tags, custom attributes, phone and cell phone number...
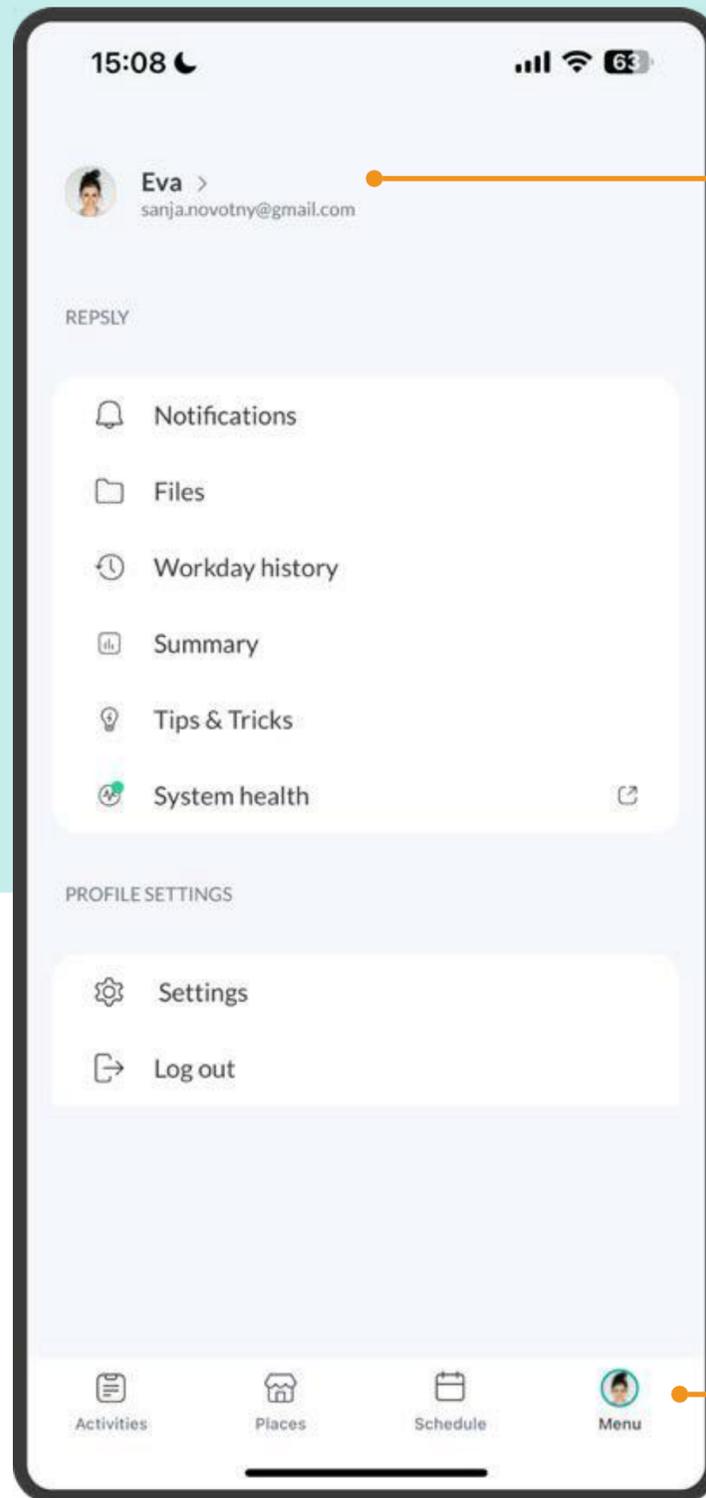
1 Click on the PLACE tab and select the place you wish to see from the place's list.
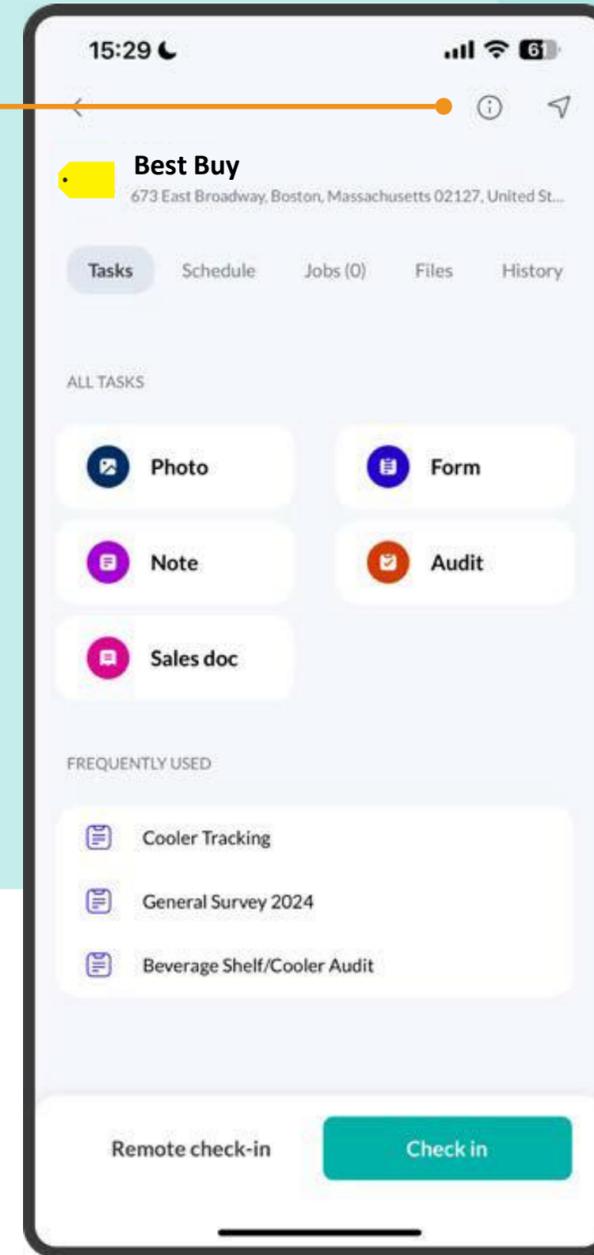
2 Click on the CONTACT INFO, located at the top of the page.

**3** Scroll to view CONTACT INFO about the Place.

HOW TO UPDATE THE PROFILE PICTURE

Repsly allows you to have a profile picture, which is then visible next to the activities you perform.

1 Open your Repsly app, and tap on MENU. After that click on your name.

2 Click the PEN ICON on your profile picture *(choose to take a photo or upload one from your gallery)*. Once you've selected your picture, tap CHOOSE to set it as your profile photo.
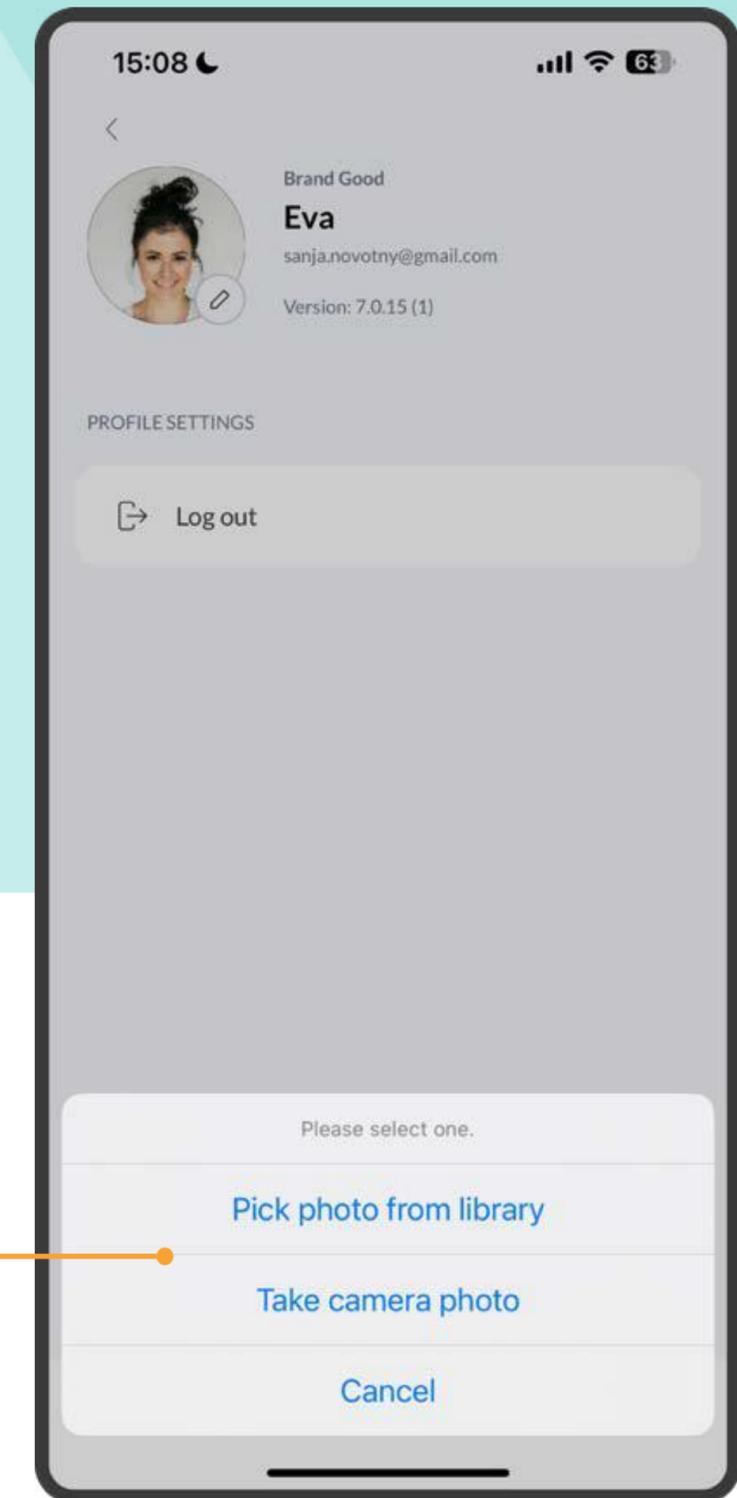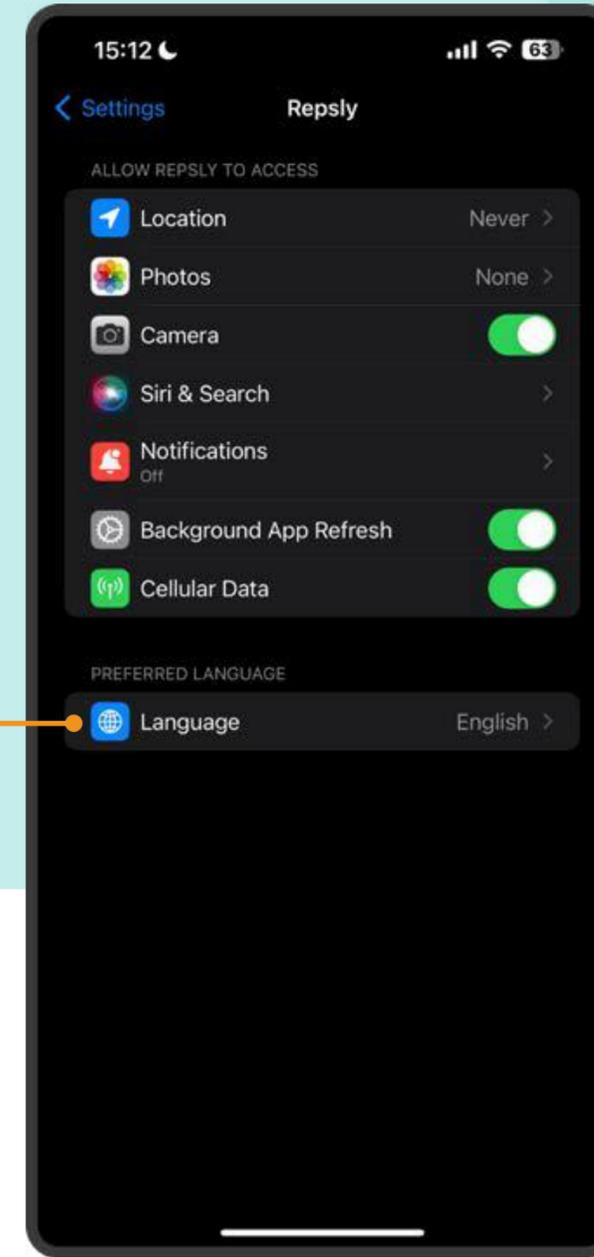
HOW TO CHANGE THE LANGUAGE IN REPSLY
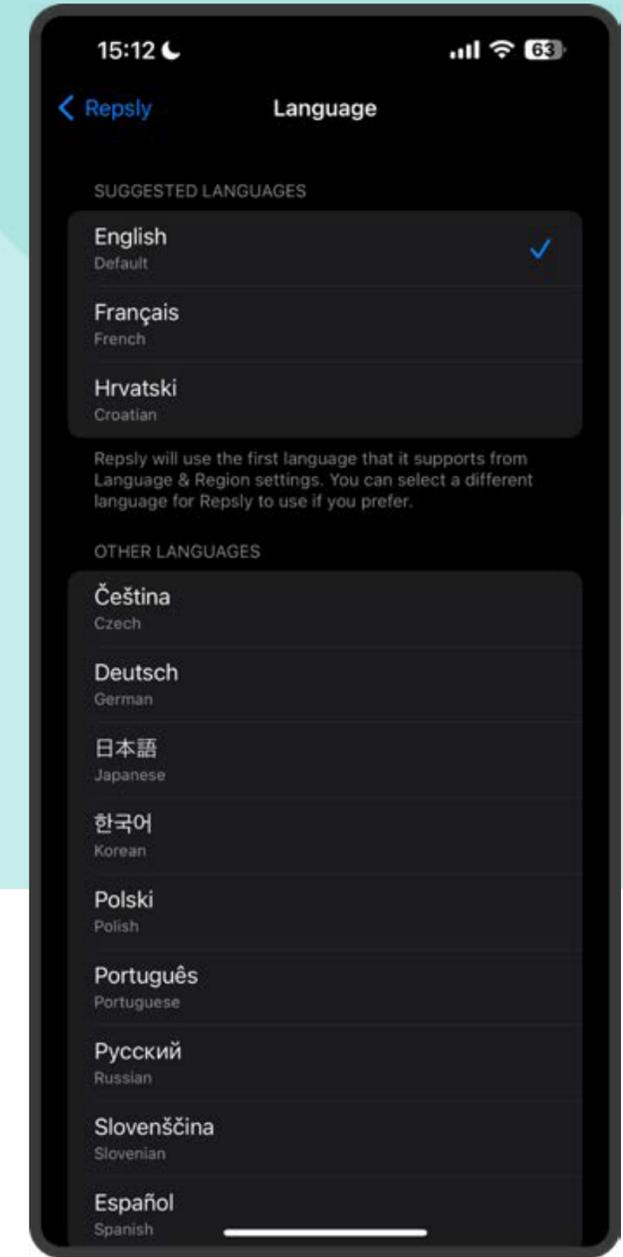
The mobile app language is changed straight from the mobile.
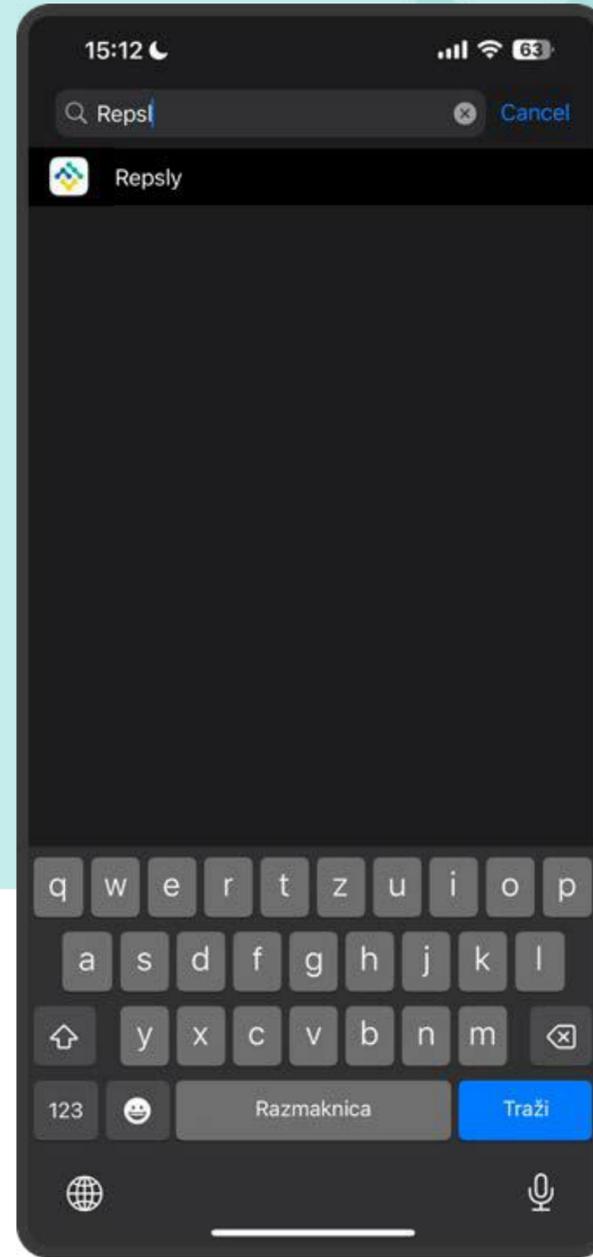
1 Click on SETTINGS and type Repsly.

2 Once you click on Repsly, choose the LANGUAGE.

3 Select which language would you like to have in your Repsly app.

Resources
& support

Knowledgebase Library

Articles about best practices on how to use Repsly app.

Review them here.

Or select MENU in your Repsly app, tap on TIPS & TRICKS. Use search bar to find what you need help with.

Support

If you experience any technical issues, please have your manager reach out to thirdparty@bestbuy.com