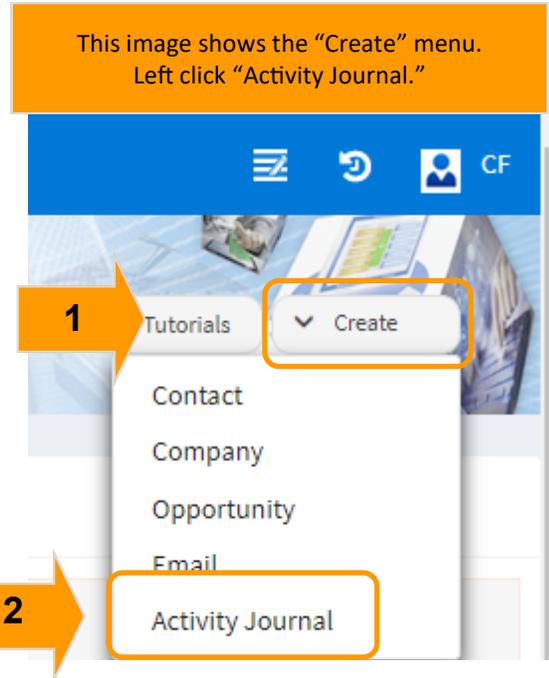




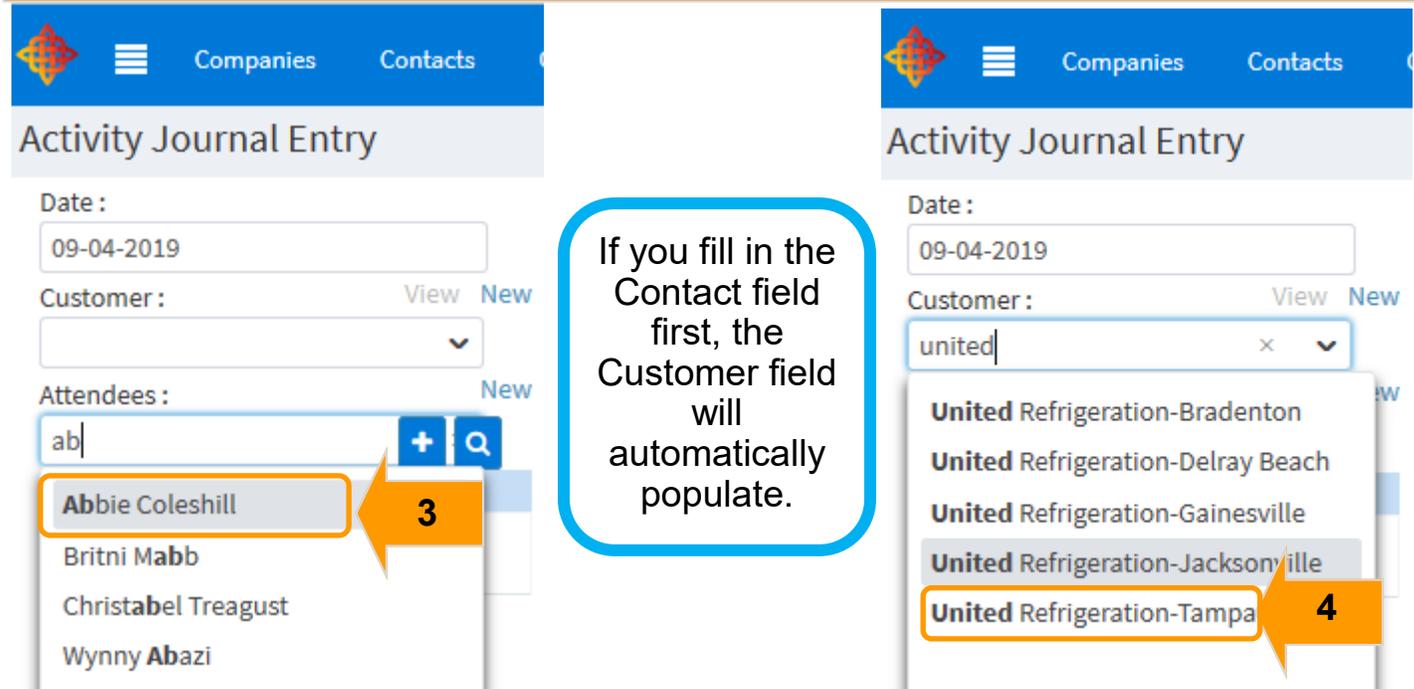
Activity Journal—How to Make Call Notes & Reminders using “Create” Button (web portal)

You can create an Activity Journal entry from anywhere in the Repfabric web portal. The “Create” button appears in the top right corner of every screen. You will then have to select a “Contact” and “Customer.” Remember if you select the “Contact” first, the “Customer” will automatically populate.

1. Left click “Create” button.
2. Left click “Activity Journal.”
3. Left click drop-down and select a “Contact.”
4. Left click drop-down and select a Customer” (if you do not know a contact’s name, then select a customer).



This image shows the drop-down options for “Customer” and “Contact.”





5. a) Leave “Subject” blank as it will auto-fill after you select “Type” and save
5. b) Select “Type” by left clicking the drop-down arrow over on the right. The default call type is sales call. These can be edited by our administrator under Sub-Tables.
6. Add comments to a manufacturer.
7. Add comments to additional manufacturer(s) *Optional*
8. Left click “Save.”

PRO TIP: **X** Do not use the “General Notes” section unless necessary. That is for internal or rapport-building notes. Whatever you enter here can be exported and will repeat on EACH manufacturer’s activity journal. It’s best to leave that blank while learning Repfabric.

This image shows how to start a new Activity Journal.

8

This image shows how to enter details and comments on an Activity Journal.
You can enter a comment under any of the manufacturers.

This concludes the instructions for this section.



Activity Journal- How to Make Call Notes & Reminders in a Contact (Web Portal)

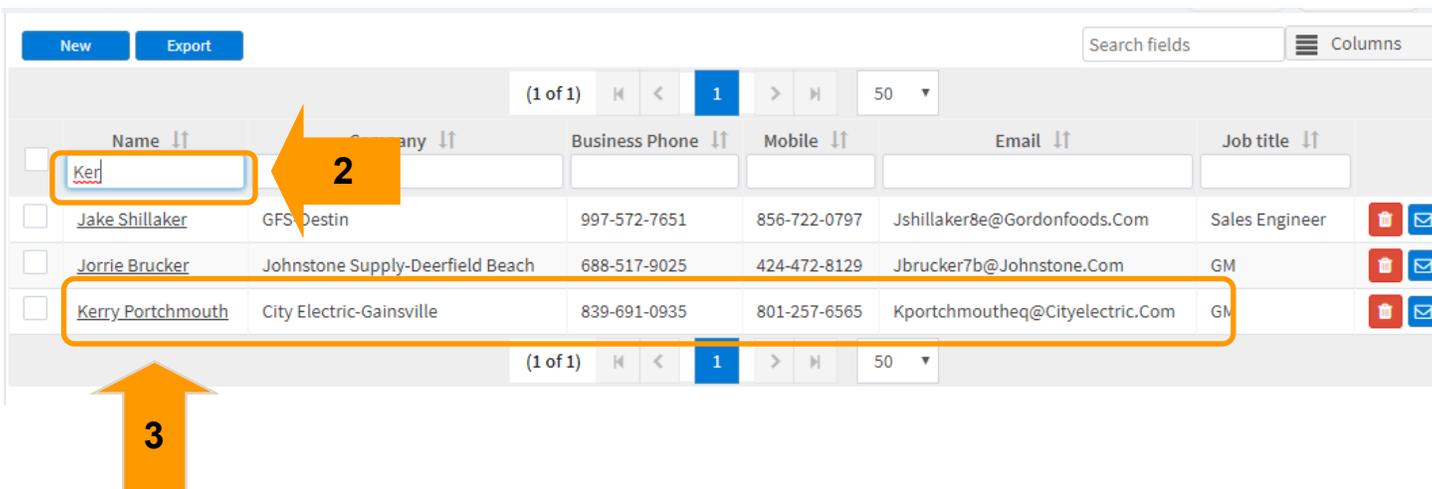
The advantage to entering Activity Journal entry in a Contact is that the Customer (aka Company) will automatically populate.

1. Left click "Contacts."
2. Start typing the first few letters of the contact's name in the search field.
3. Left click desired Contact.

These images show "Contacts" in the shortcut menu and the global menu



This image shows where to search for a contact.





4. Left click “Activity Journal” tab.
5. Left click “New.”
6. a) Leave “Subject” blank as it will auto-fill after you select “Type” and save
6. b) Select “Type” by left clicking the drop-down arrow over on the right. The default call type is sales call. These can be edited by our administrator under Sub-Tables.

This image shows where you will left click “Activity Journal” tab.

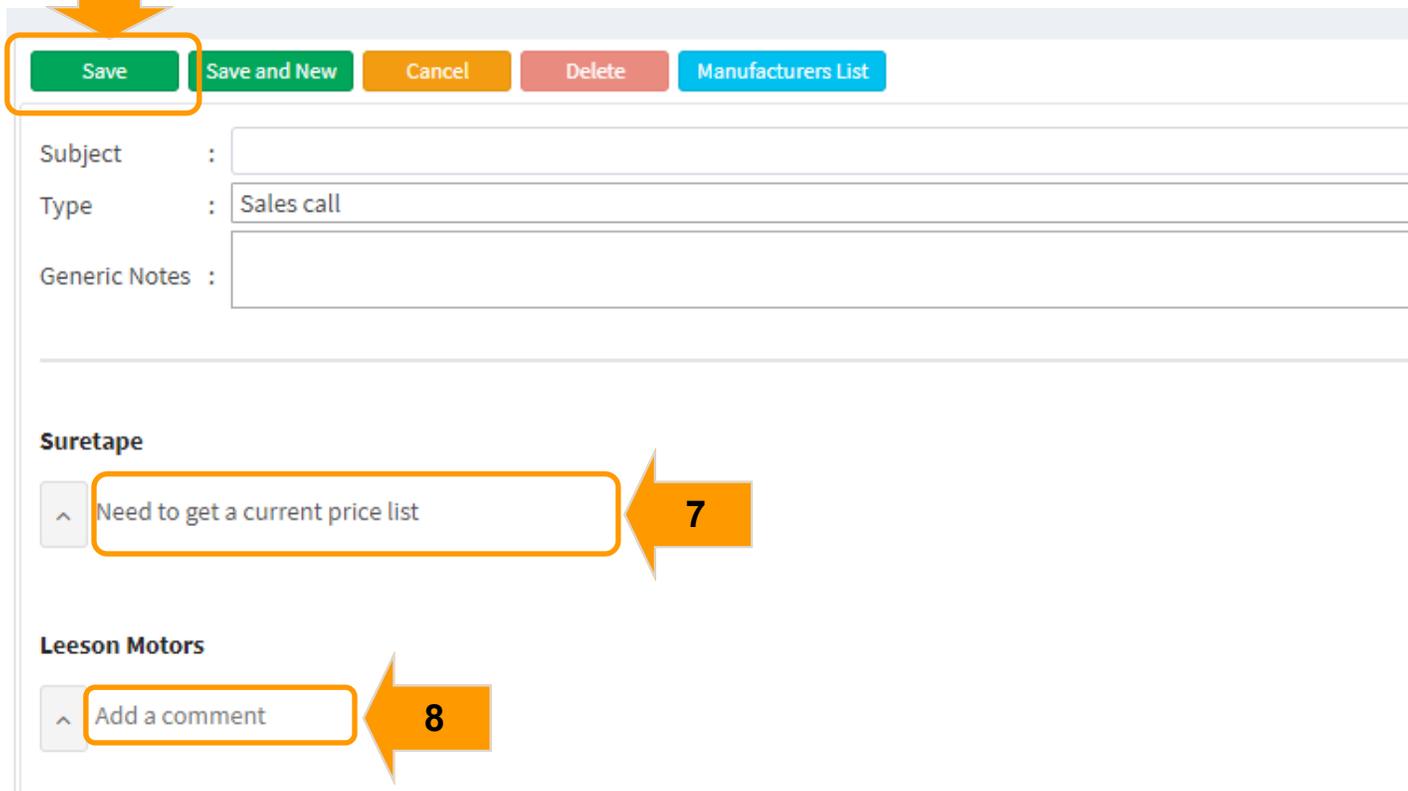
These images show the “New” button, “Subject” and “Type.”

Contact Details

7. Add comments to a manufacturer.
8. Add comments to additional manufacturer(s) *Optional*
9. Left click "Save."

This image shows how to enter details and comments on an Activity Journal.
You can enter a comment under any of the manufacturers.

9



The screenshot shows a web form for an Activity Journal. At the top, there is a row of buttons: "Save" (green), "Save and New" (green), "Cancel" (orange), "Delete" (red), and "Manufacturers List" (blue). The "Save" button is highlighted with an orange box and a number 9. Below the buttons are three input fields: "Subject" (empty), "Type" (containing "Sales call"), and "Generic Notes" (empty). Below these fields, there are two sections for manufacturers. The first section is titled "Suretape" and contains a comment box with the text "Need to get a current price list", which is highlighted with an orange box and a number 7. The second section is titled "Leeson Motors" and contains a comment box with the text "Add a comment", which is highlighted with an orange box and a number 8.

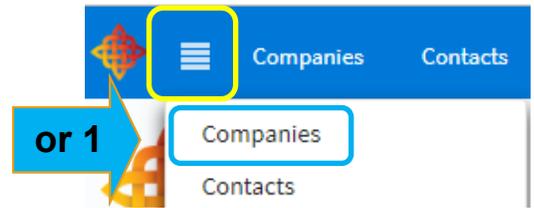
This concludes the instructions for this section.



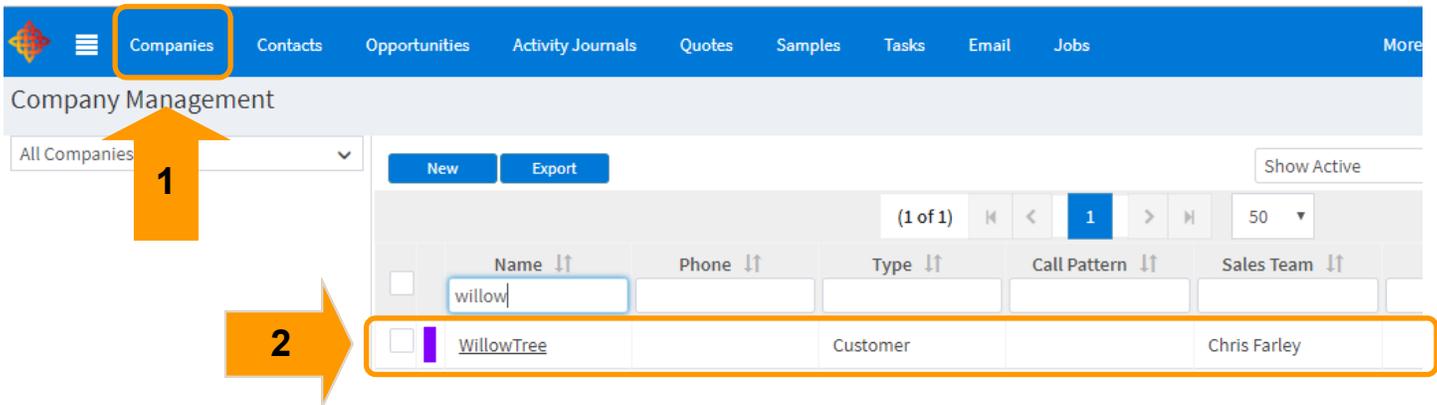


Activity Journal - How to Make Call Notes & Reminders in a Company (web portal)

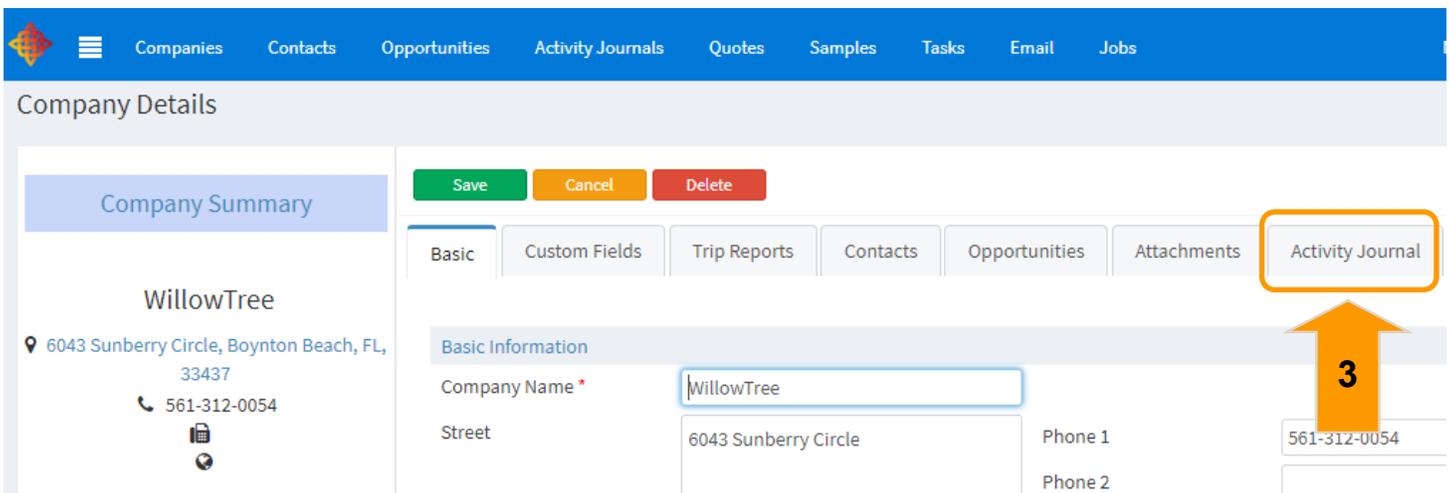
1. Left click "Companies."
2. Left click desired Company.
3. Left click "Activity Journal" tab.
4. Left click "New" button.



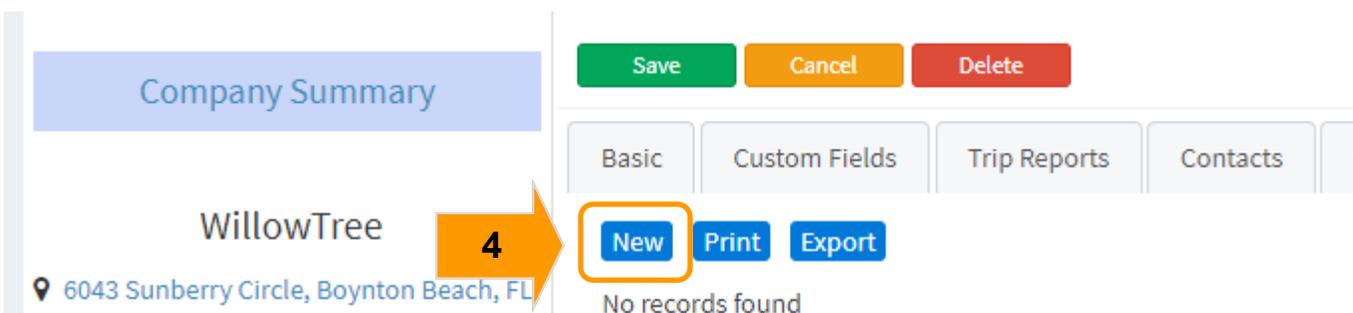
This image shows where to find "Companies" and how to search for a specific company name.



This image shows where to find "Companies" and how to search for a specific company name.

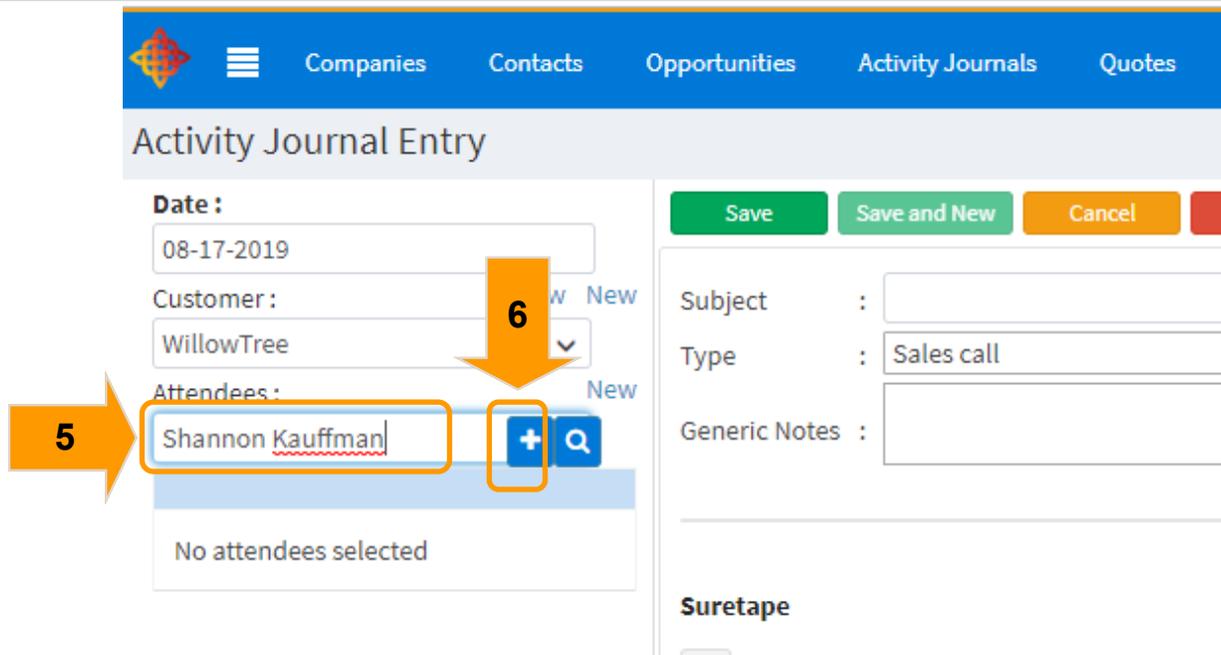


This image shows there are no activity journals for this company yet.



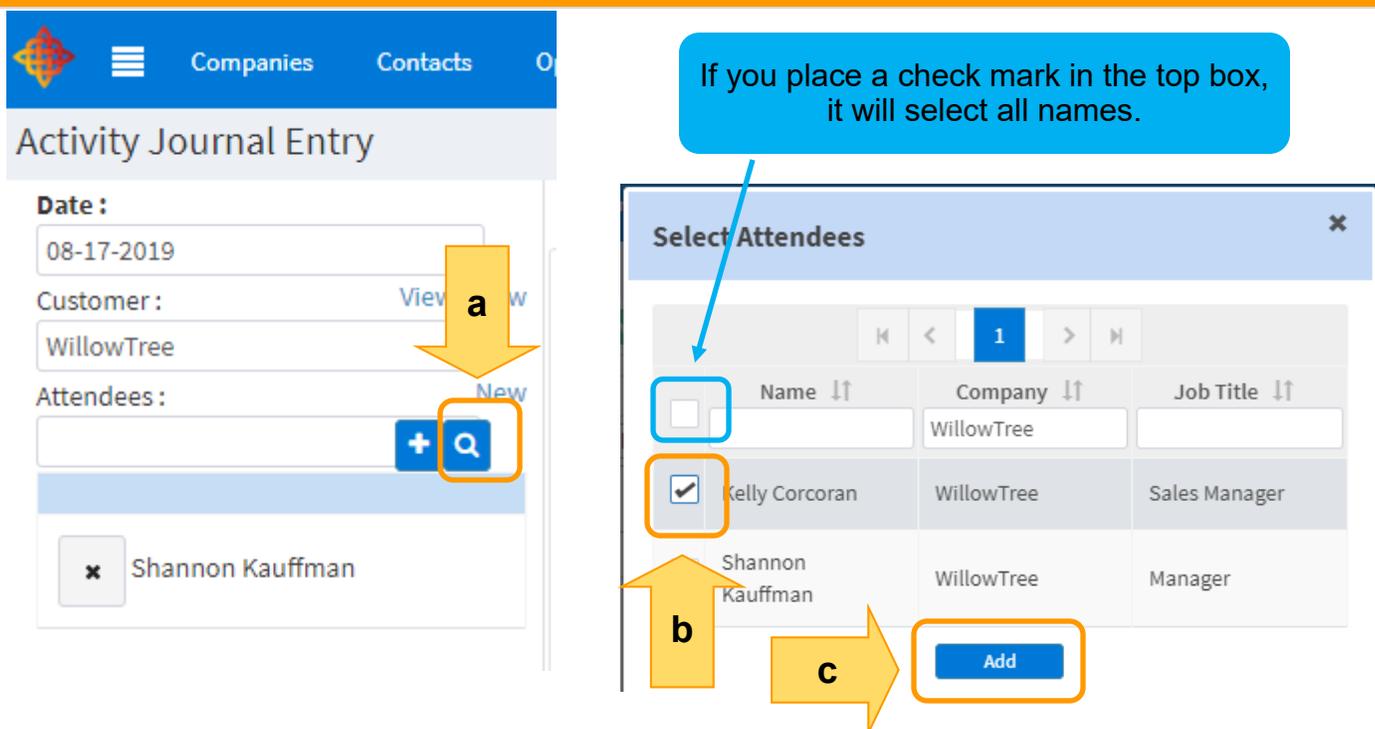
5. Type name in by hand.
6. Left click “+” sign to add the name. **OR**
 - a. Left click magnifier to choose name from contact list.
 - b. Place check mark next to desired name(s).
 - c. Left click “Add.”

This image shows how to add a name by hand.



The screenshot shows the 'Activity Journal Entry' form. The 'Attendees' field contains the text 'Shannon Kauffman'. An orange arrow labeled '5' points to the text input. Another orange arrow labeled '6' points to the '+' icon next to the search icon in the attendees field. The form also shows fields for Date (08-17-2019), Customer (WillowTree), Subject, Type (Sales call), and Generic Notes. Buttons for Save, Save and New, and Cancel are visible at the top right.

These images show how to search for a contact name.



The first screenshot shows the 'Attendees' field with a search icon. An orange arrow labeled 'a' points to the search icon. A blue callout box says: "If you place a check mark in the top box, it will select all names." The second screenshot shows a 'Select Attendees' modal window with a table of contacts. An orange arrow labeled 'b' points to the checkbox for 'Kelly Corcoran'. Another orange arrow labeled 'c' points to the 'Add' button at the bottom right of the modal.

Name ↑↓	Company ↑↓	Job Title ↑↓
<input type="checkbox"/>	WillowTree	
<input checked="" type="checkbox"/>	WillowTree	Sales Manager
<input type="checkbox"/>	WillowTree	Manager



7. Type in "Subject" field. If no subject is added, it will default to the call type. *Optional*
8. Select the drop-down for which call type, such as "Call with Distributor" *Optional*
9. Add "Generic Notes" for notes about the contact and the meeting that are not line specific. **CAUTION: "General Notes" can be exported and will repeat on EACH manufacturer's activity journal. It's best to leave that blank while learning Repfabric. Only use as necessary. *Optional***

This image shows the "Subject" and "Type" fields.

Save Save and New Cancel Delete Manufacturers List

Subject : Tesla

Type : Sales call

Generic Notes :

Suretape : Sales with Distributor

^ Add a comment

This image shows the "Generic Notes" field (which we will leave blank for now).

Save Save and New Cancel Delete Manufacturers List

Subject : Willow Tree North

Type : Sales call

Generic Notes :

9

Hand type information:

10. Left click “Add Comment” box.
11. Hand type comments under a line. *If your computer is configured for dictation, you can dictate into each line’s input box.*

This image shows where to left click to type a comment for this manufacturer.

Type : Sales call

Generic Notes :

Suretape

^ Add a comment **10**

This image shows a comment by typing it out.

Save Save and New Cancel Delete Manufacturers List

Subject : Willow Tree North

Type : Sales call

Generic Notes :

Suretape

^ They are concerned with compostability. They use our competitor. **11**

Leeson Motors

^ Add a comment

You will “Save” when you have finished entering all necessary comments for all applicable manufacturers in this activity journal.



OR Choose from drop-down to use a “Canned” call note.

10. Left click the drop-down menu under a manufacturer.
11. Place a check mark next to all applicable options & left click “OK.”

These images show how to use “Pitches” (auto-text) to enter frequently-typed comments quickly.

Suretape

^
They are concerned with compostability. They use our competitor.

Leeson Motors

^
Pitches ment

10

You will “Save” when you have finished entering all necessary comments for all applicable manufacturers in this activity journal.

Select Pitch

⏪ < 1 > ⏩

	Pitch ⬆️⬆️
<input type="checkbox"/>	
<input checked="" type="checkbox"/>	We covered our products.
<input type="checkbox"/>	We reviewed our literature.
<input checked="" type="checkbox"/>	No interest at this time.

11

OK

12. Left click "Save."

This image shows the finished Activity Journal Entry.

The screenshot shows the 'Activity Journal Entry' form in a web portal. The navigation bar at the top includes 'Companies', 'Contacts', 'Opport', 'Activity Journals', 'Quotes', 'Samples', 'Tasks', 'Email', and 'Jo'. The form fields are as follows:

- Date :** 08-17-2019
- Customer :** WillowTree (with 'View' and 'New' links)
- Attendees :** Kelly Corcoran, Shannon Kauffman (with '+', 'Q', and 'New' links)
- Subject :** Willow Tree North
- Type :** Sales call
- Generic Notes :** (empty text area)
- Suretape**
 - They are concerned with compostability. They use our competitor.
- Leeson Motors**
 - We covered our products., No interest at this time.
- Cincinnati Test**
 - Add a comment

The 'Save' button is highlighted with an orange box, and a large orange arrow labeled '12' points to it.

This concludes the instructions for this section.





Activity Journal - How to Make Call Notes & Reminders using an Event Link on Home Page (web portal)

When you open your instance of Repfabric you will see upcoming Tasks, Events, Messages, and Follow Ups for Opportunities and Activity Journals.

You can access some of these items by left clicking on the blue text (links).

You can create an activity journal from an event. You can start here, as demonstrated below, or you can follow the instructions on the next page, to access an event from your calendar.

This image shows a sample Home Screen. Left click desired Event.

The screenshot displays the Repfabric Home Screen interface. At the top, there is a navigation bar with the following menu items: Companies, Contacts, Opportunities, Activity Journals, Quotes, Samples, Tasks, Email, Jobs, and More. The user's profile is identified as 'CF'. Below the navigation bar, the main content area is divided into several sections:

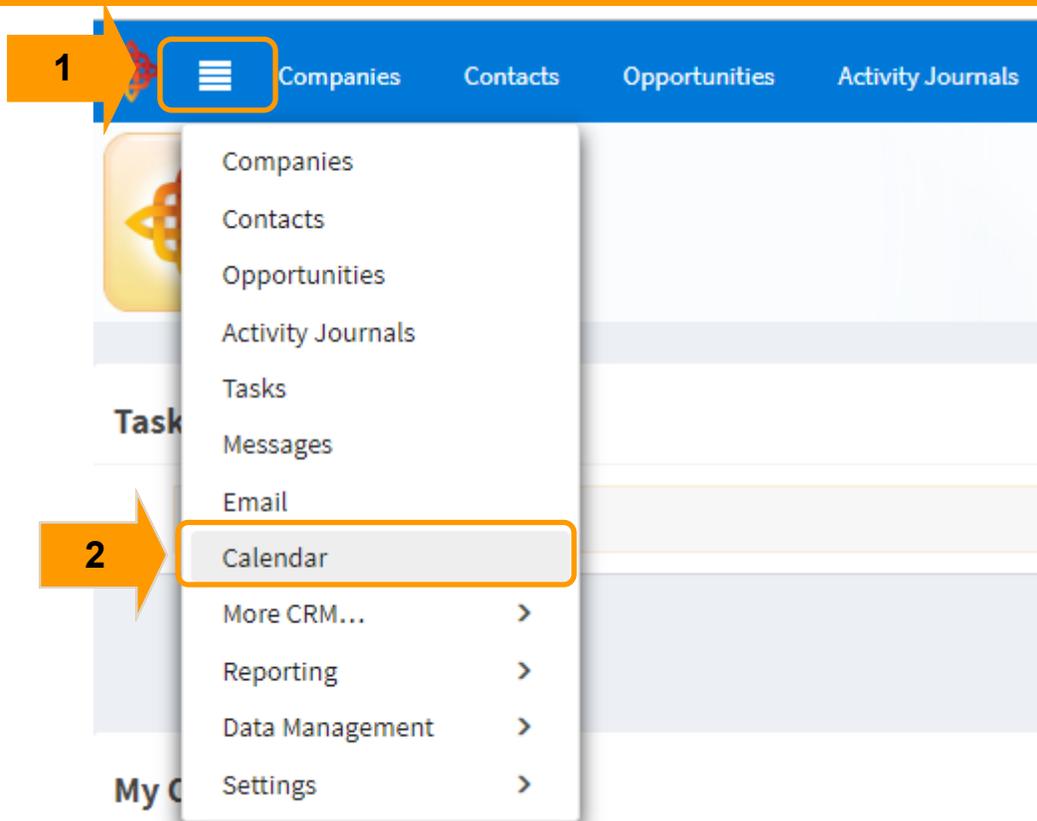
- Tasks:** A card showing 'No Tasks'.
- Events:** A card showing a single event: 'Type: Business Location: 6043 Sunberry Cir Boynton Beach, FL 33437 Lunch with Shannon at Willow Tree'. This event card is highlighted with a red border, and a red arrow points to it from above.
- My Opportunities:** A card showing 'No Follow Ups' and a link to 'My Opportunities'.
- My Activity Journal:** A card showing 'No Follow Ups' and links to 'My Activity Journal' and 'Show All'.
- Messages:** A card showing 'No Messages'.



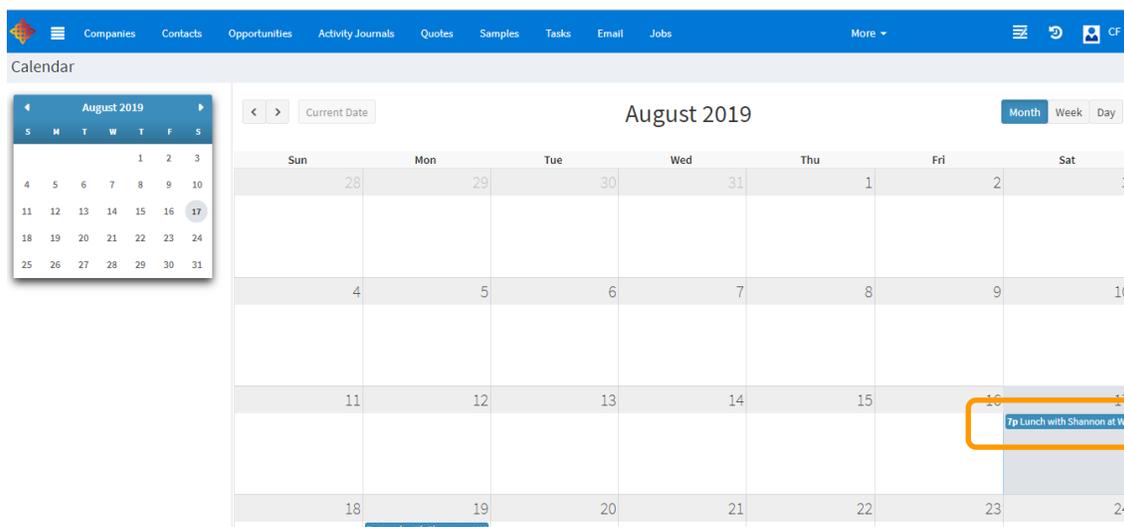
How to Make Call Notes & Reminders from **Calendar** (web portal)

1. Left click menu icon.
2. Left click "Calendar."
3. Left click desired event.

This image shows where to find the menu and "Calendar."



This image shows a sample appointment on the calendar.





4. Left click “Create Journal.”

Starting on page 63, follow steps 5-10 to create the Activity Journal.

This image shows an example appointment. “Linked Journal” is in bottom right corner.

Event Details ✕

Event Invite

Title: *

Location:

Category: Priority:

All day: Private: Color:

Start: End:

Reminder: Off On Alert:

Description:

4



◇ **Mobile App- How to Make Call Notes & Reminders Using Activity Journal**

Activity Journal entries allow you to keep track of what activity has taken place with a Company/Contact. Best practice for Activity Journal entries is to select the Contact first. The Customer (aka Company) will then automatically populate. There are 8 different ways to access a new Activity Journal entry. You can create an entry using the web instance of Repfabric or using the app on your smart phone. The Mobile App tutorials are covered in this document. There is a separate document containing instructions from Web Portal

Places to access Activity Journal & create an entry

◇ Repfabric Web Portal

1. From “Create” button top right corner of portal.
2. In a Contact
3. In a Company
4. From Calendar in “Organizer”
5. From Event link on Home page

◇ **Repfabric Mobile App**

- 6. In a Contact**
- 7. In a Company**
- 8. From an Event link/Calendar**

◇ **Setting “Call Types” and “Subjects”**

Using a common set of words for the “Subject” of your Activity Journal will allow you to answer. Subjects are defaulted from your email calendar names, but can be entered as a topic of the meeting. ““Had lunch with Kathy”, “Stopped by Chuck’s office.” for example.

Call types are set by your administrator and should be used for the kind of meeting or action that was held. Examples include:

- ◆ Sales call (default)
- ◆ Phone call
- ◆ Inbound call
- ◆ Call with Manufacturer
- ◆ Drop in

Call types make classifying the amount of effort put into a particular product line very simple for insightful comparisons against the dollars that line generates.

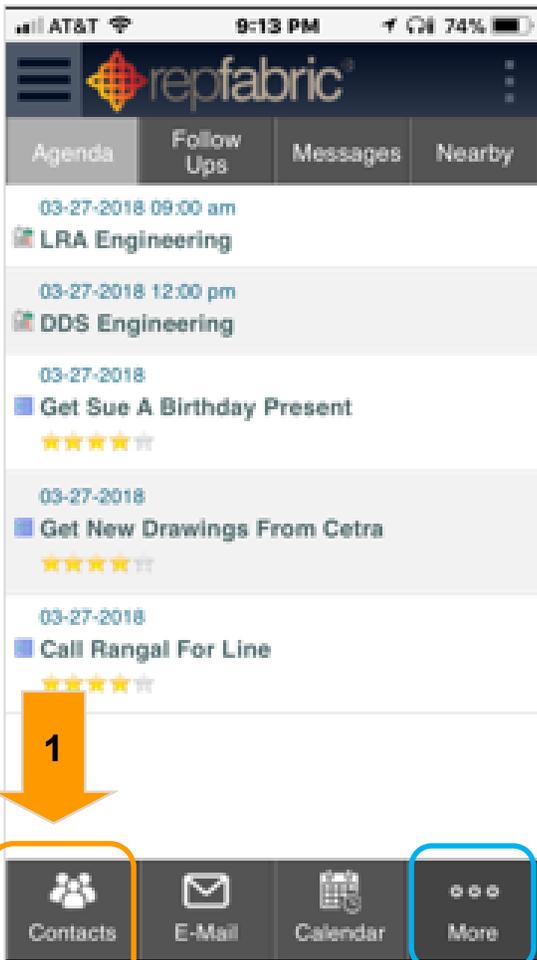


Activity Journal - How to Make Call Notes on Mobile App in a Contact

The advantage to entering an Activity Journal entry in a Contact is that the Company (aka Customer) will automatically populate. If you want to access the Home screen, Tap the Repfabric logo.

1. Tap "Contacts."
2. Use search field to locate desired contact.
3. Tap the "Notebook +" icon next to the contact's name

This image shows where to tap "Contacts."

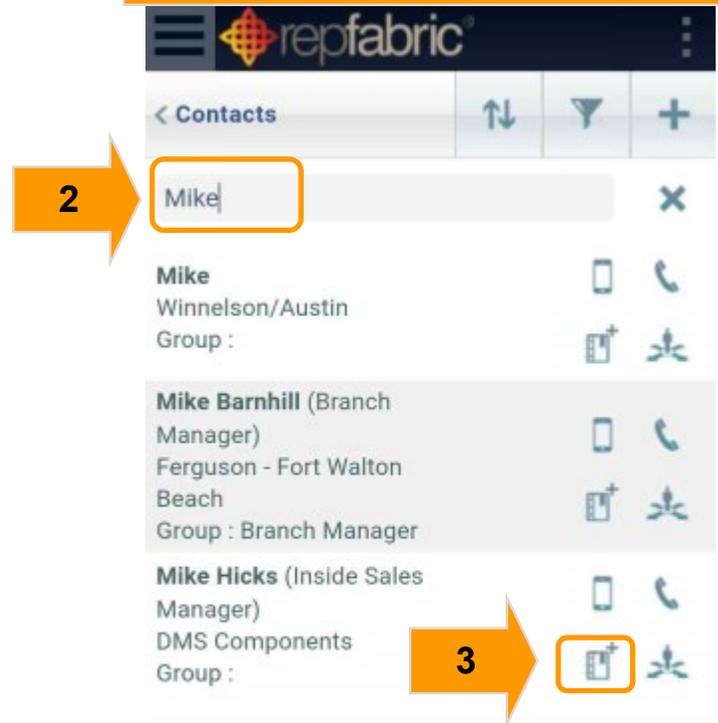


If you do not see the button you are looking for, tap "More"
If you do not see any buttons, tap the Repfabric logo to return to "Home" screen.

Tap the logo to reach "Home." screen at any time.



This image shows where to enter search criteria and tap a contact.

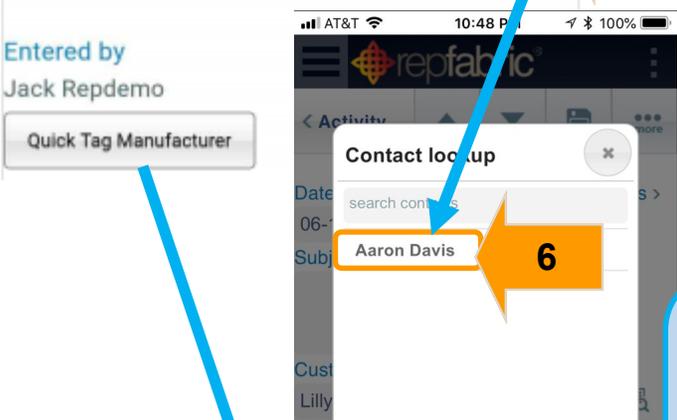
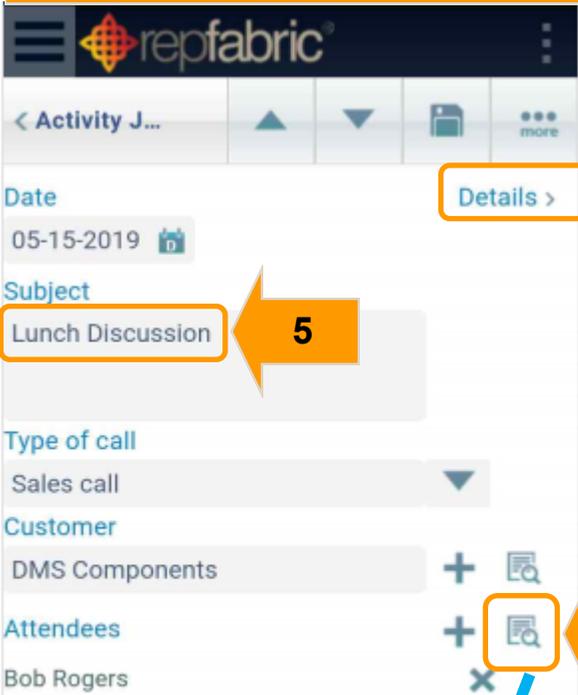




5. Dictate or type in "Subject" (if blank, Type of Call will be auto-inserted) *Optional*
6. Tap magnifying glass & select a contact person (plus sign will create a new contact).
7. Tap "Details."
8. Dictate or type in comments about the line discussed during the call.
9. Add comments to additional lines(s) (optional).
10. Tap "Save" icon

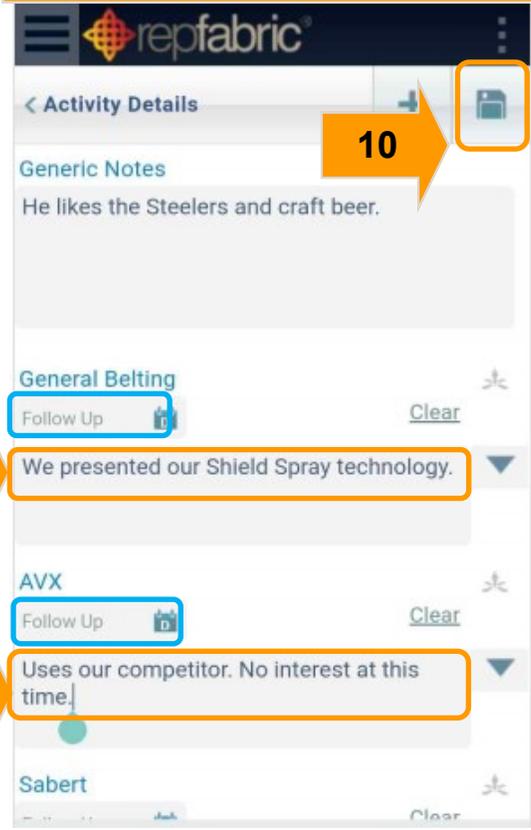
Optionally fill in:
Type of call: Sales call, Sales call with Distributor, etc.
Generic Notes: these notes are **NOT** manufacturer specific and can be used for your own personal memory trigger. "He likes the Steelers"

This image shows the "Subject" field and "Details."



"Quick Tag" allows you to filter for just the lines discussed without scrolling through dozens of lines if you have long line card.

This image shows your list of lines where you can enter your notes



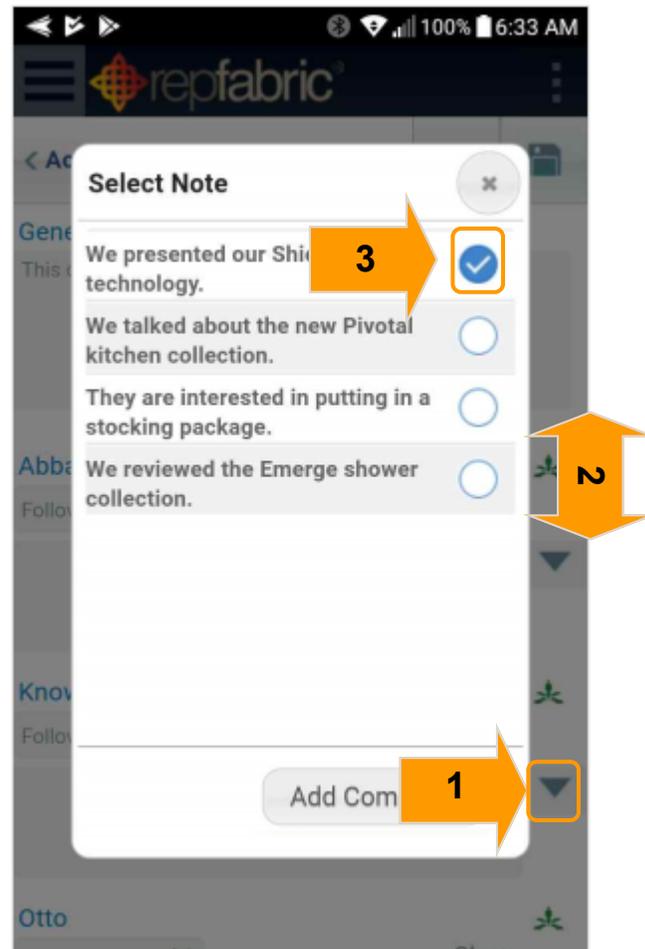
If you tap "Follow Up" above any entry, a calendar will pop up from bottom of the screen. Select a date for follow up on this entry. You can see all "follow ups" on the Home page or sort by "follow up" when viewing a list of Companies or Contacts. You can choose a separate date for each entry. Once you select the follow-up date, save the activity journal.



How to Use “Canned” call notes (drop-down) OPTION

1. Click the drop-down arrow.
2. Scroll as needed.
3. Select the note(s) you want to insert.

This image shows your list of lines with the drop-down selection.



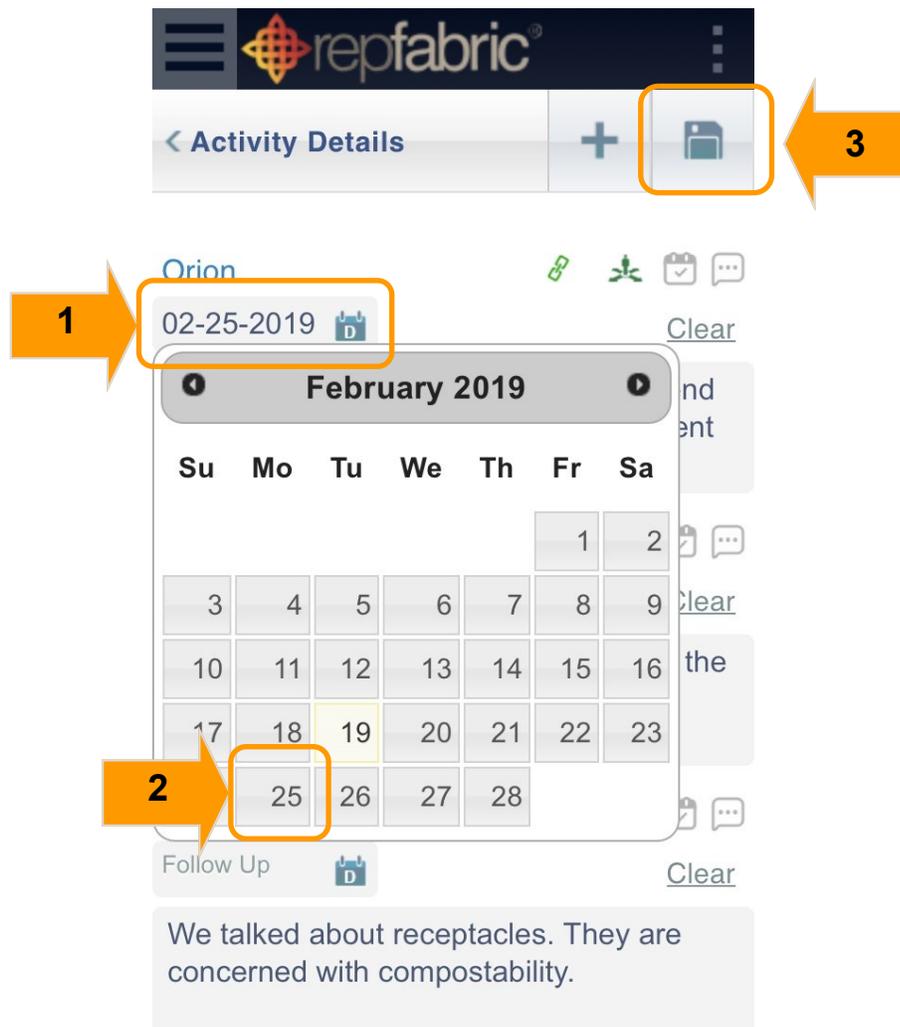
If you tap “Follow Up” above any entry, a calendar will pop up from bottom of the screen. Select a date for follow up on this entry. You can see all “follow ups” on the Home page or sort by “follow up” when viewing a list of Companies or Contacts. The mobile app follow-up tab and morning email reminder will include it also. You can choose a separate date *for* each entry. Once you select the follow-up date, save the activity journal.

How to Add a Follow Up Date

1. Left click “Follow Up Calendar icon”
2. Select the date you want to follow up on from the pop-up calendar by tapping on the day you want.
3. Tap the “Save” icon.

On the day of the follow up, you will get a reminder email (if your notifications are turned on and the reminder will be surfaced on the Home Screen and Follow Up tab in mobile).

This image shows the follow up calendar that pops up when you tap “Follow Up.”



This concludes the instructions for this section.

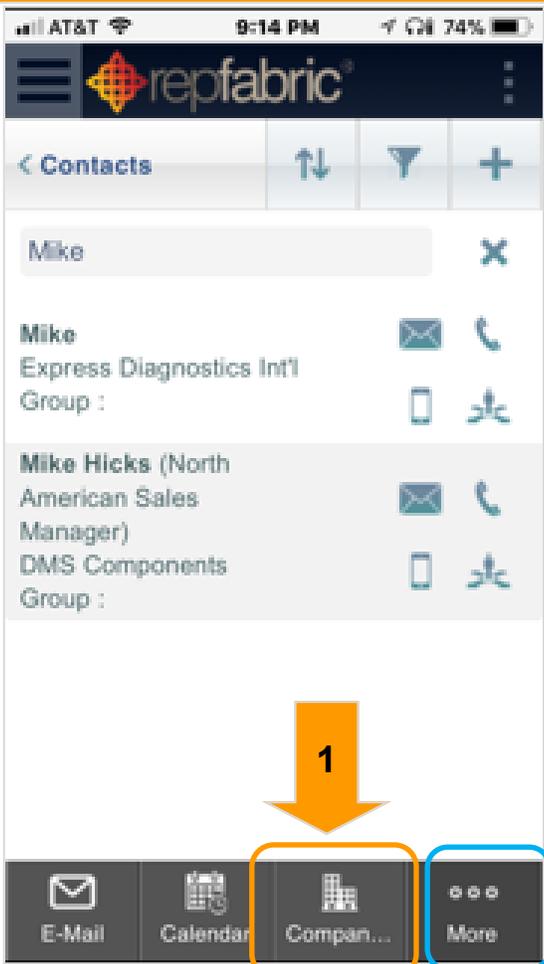




Activity Journal - How to Make Call Notes on Mobile App in a Company

1. Tap “Companies.”
2. Tap desired company’ journal icon (scroll or use “Search” field to find desired Company).

This image shows the “Companies” button.

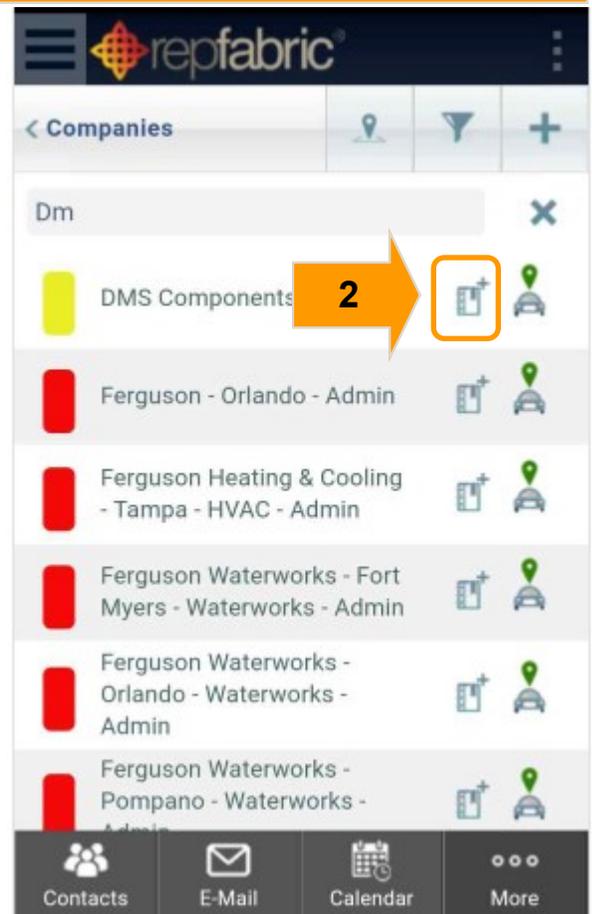


If you do not see the button you are looking for, tap “More”
If you do not see any buttons, tap the Repfabric logo to return to “Home” screen.

Tap the logo to reach “Home.” screen at any time.



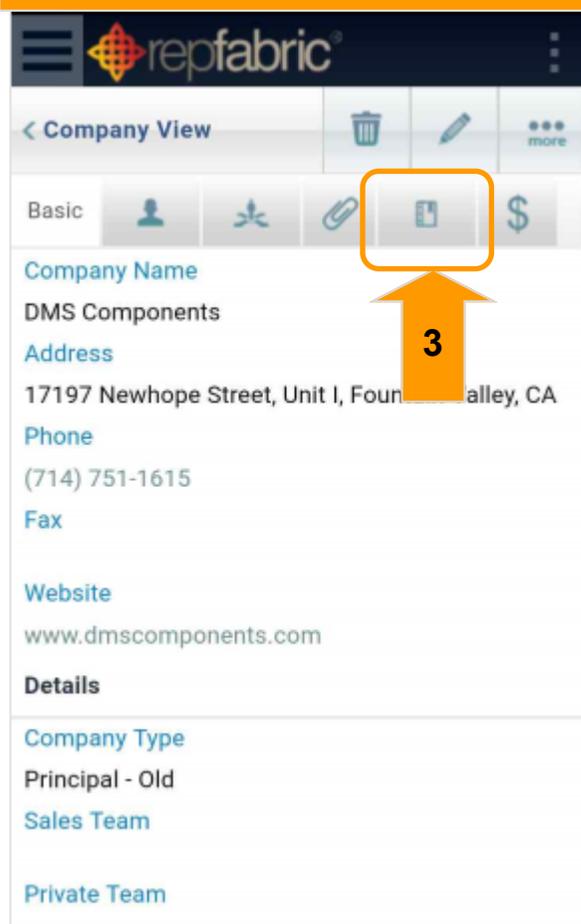
This image shows a sample list of Companies.



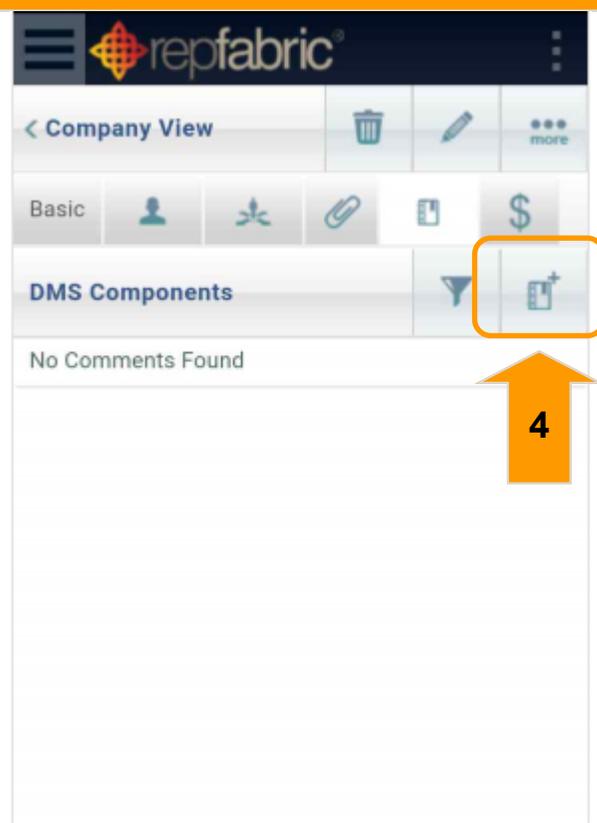
OPTION: Instead of the list view pictured in the prior screen shot, you can also add an Activity Journal within a company per the procedure below.

3. Tap “Activity Journal” icon.
4. Tap “New Activity Journal” icon.

This image shows “Activity Journal” icon.



This image shows “New Activity Journal” icon.

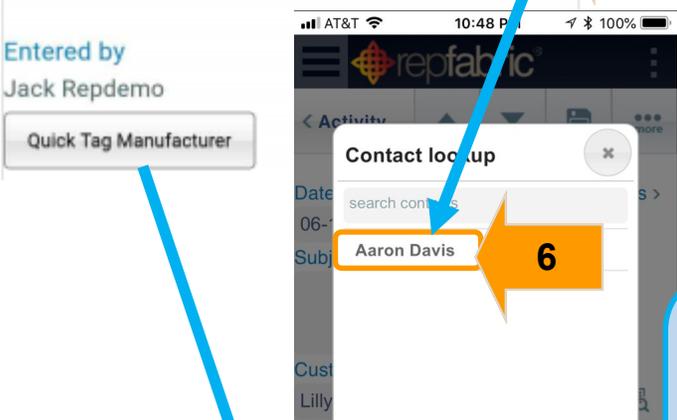
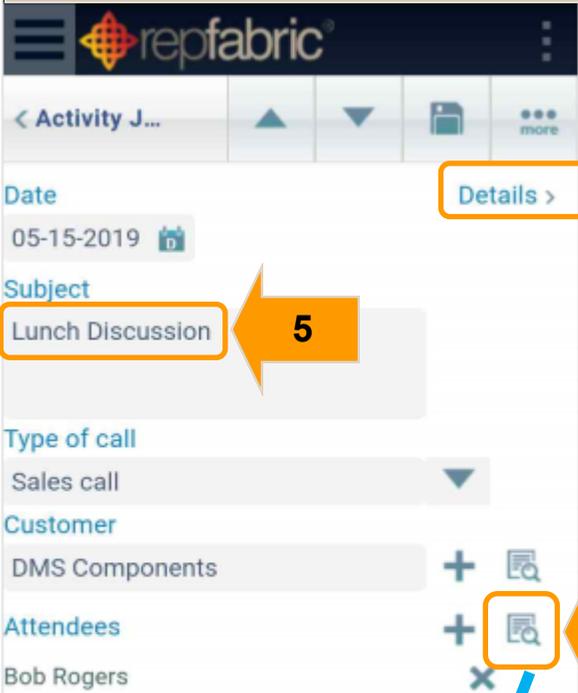




5. Dictate or type in "Subject" (if blank, Type of Call will be auto-inserted). *Optional*
6. Tap magnifying glass & select a contact person (plus sign will create a new contact).
7. Tap "Details."
8. Dictate or type in comments about the line discussed during the call.
9. Add comments to additional lines(s) (optional).
10. Tap "Save" icon

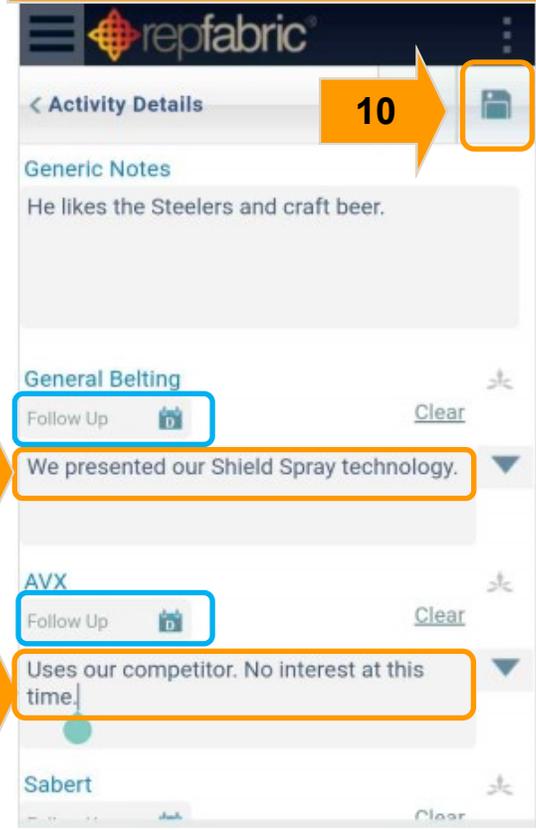
Optionally fill in:
Type of call: Sales call, Sales call with Distributor, etc.
Generic Notes: these notes are **NOT** manufacturer specific and can be used for your own personal memory trigger.
 "He likes the Steelers"

This image shows the "Subject" field and "Details."



"Quick Tag" allows you to filter for just the lines discussed without scrolling through dozens of lines if you have long line card.

This image shows your list of lines where you can enter your notes



If you tap "Follow Up" above any entry, a calendar will pop up from bottom of the screen. Select a date for follow up on this entry. You can see all "follow ups" on the Home page or sort by "follow up" when viewing a list of Companies or Contacts. You can choose a separate date for each entry. Once you select the follow-up date, save the activity journal.

OPTION: You can use your Microphone for dictation:

1. Tap desired box to insert dictated text (inserts cursor there)
2. On your keyboard, tap your microphone icon (location varies by phone).



◇ **Activity Journal - How to Make Call Notes on Mobile App in a Calendar Event**

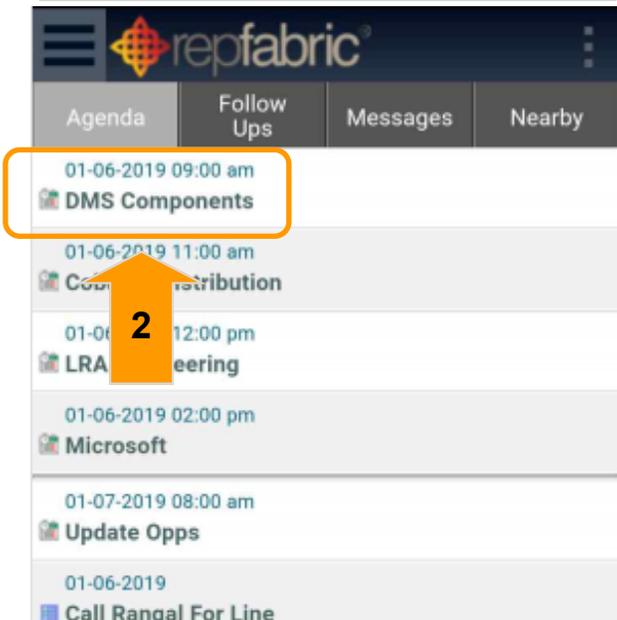
1. Tap Repfabric logo to go to home screen.
2. Tap desired event. (events are listed under the “Agenda” tab on mobile app).

NOTE: Sync+ in your email system must be “Enabled” for the calendar to sync to Repfabric.

How to access “Home.”



This image shows the “Events” for today in the “Agenda” tab.

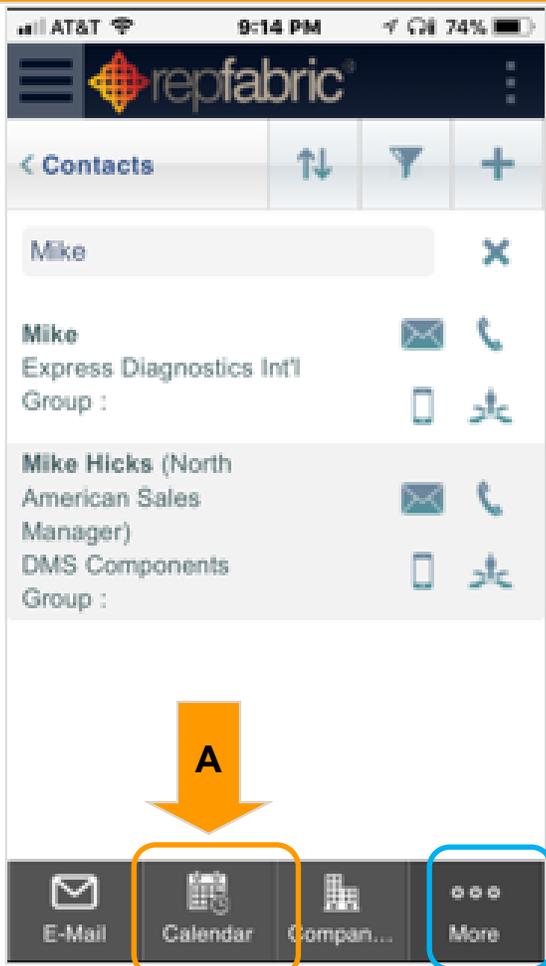




OPTION: If you need to navigate to another date to find the desired event link:

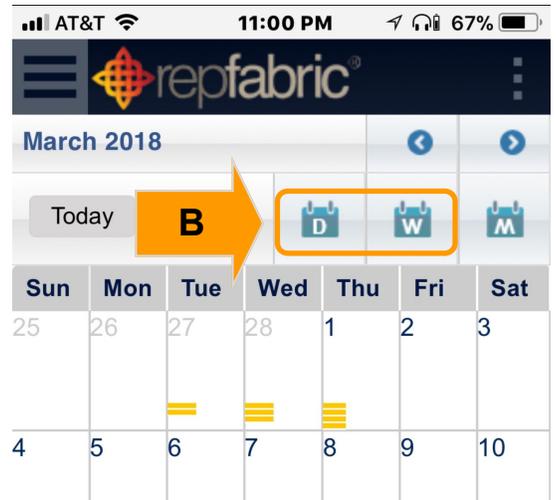
- A. Tap “Calendar.”
- B. Tap “Day” or “Week” icon to zoom in and see more detail.
- C. Tap desired event link.

This image shows the “Calendar” button.

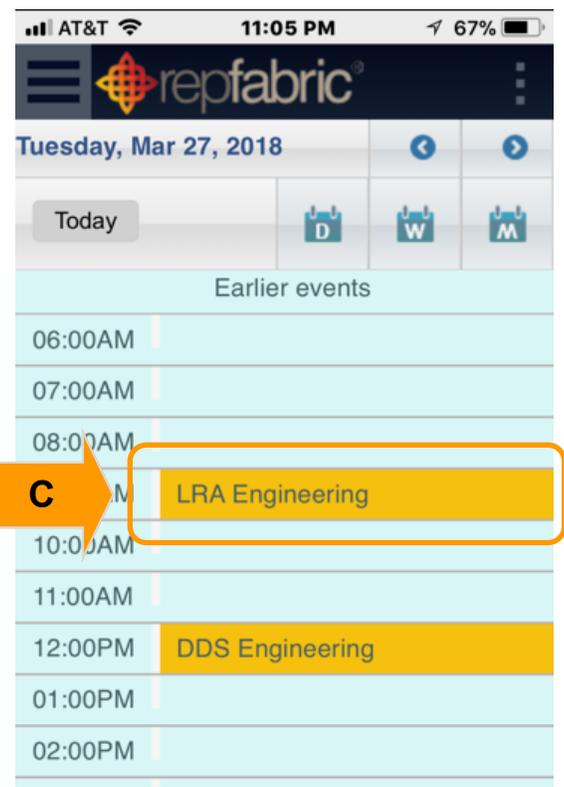


If you do not see the button you are looking for, tap “More” If you do not see any buttons, tap the Repfabric logo to return to “Home” screen.

This image shows the “Day” and “Week” icons.



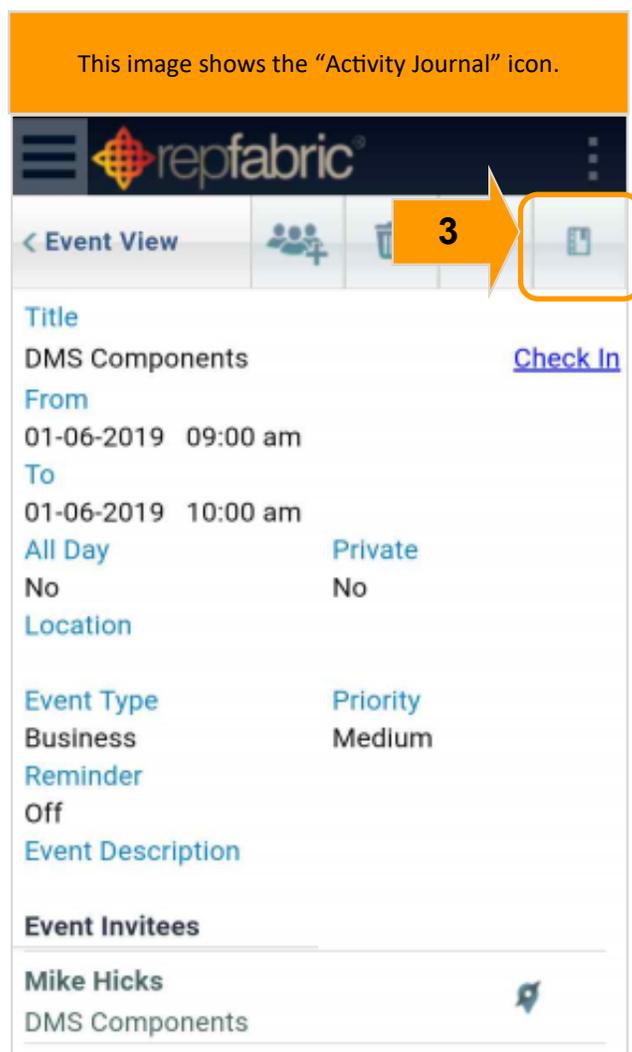
This image shows a sample day on the Calendar.



3. Tap “Activity Journal” icon.

The details on this screen are a mirror of the details on your email’s calendar event. Title is the subject line of your meeting invite in your calendar. Dates are mirrored from the times on your email calendar.

Note: These calendar entries are for your personal email address and will not reflect events on your separate company calendar.

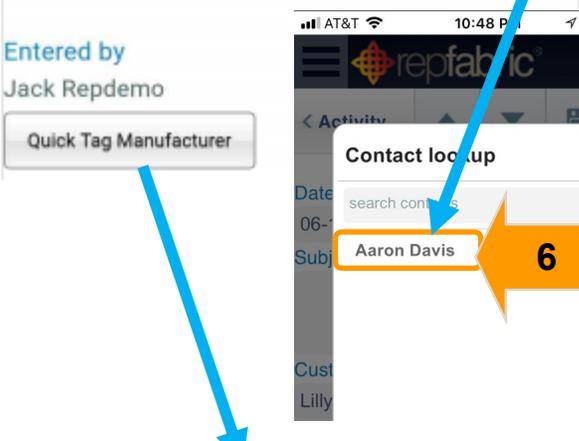
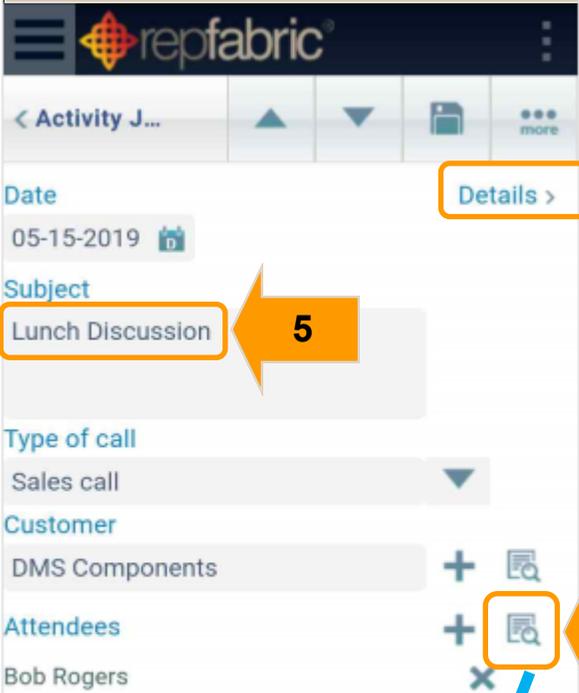




5. (Optional) Dictate or type in "Subject" (if blank, Type of Call will be auto-inserted)
6. Tap magnifying glass & select a contact person (plus sign will create a new contact).
7. Tap "Details."
8. Dictate or type in comments about the line discussed during the call.
9. Add comments to additional lines(s) (optional).
10. Tap "Save" icon

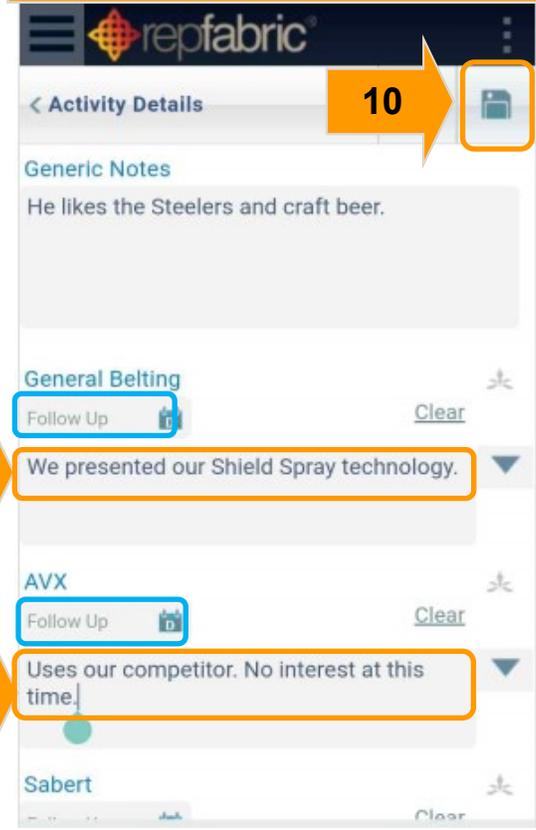
Optionally fill in:
Type of call: Sales call, Sales call with Distributor, etc.
Generic Notes: these notes are **NOT** manufacturer specific and can be used for your own personal memory trigger.
 "He likes the Steelers"

This image shows the "Subject" field and "Details."



"Quick Tag" allows you to filter for just the lines discussed without scrolling through dozens of lines if you have long line card.

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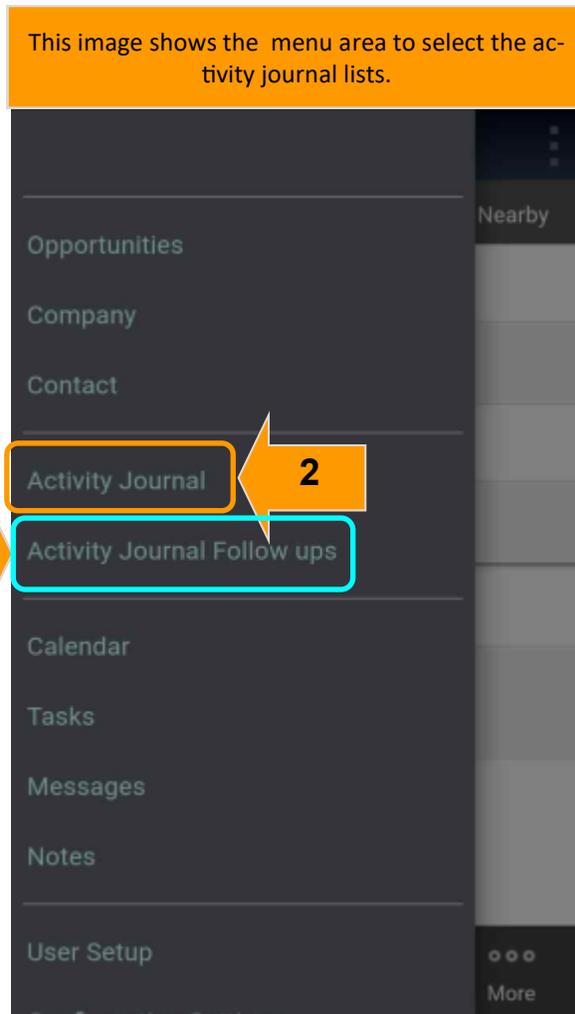
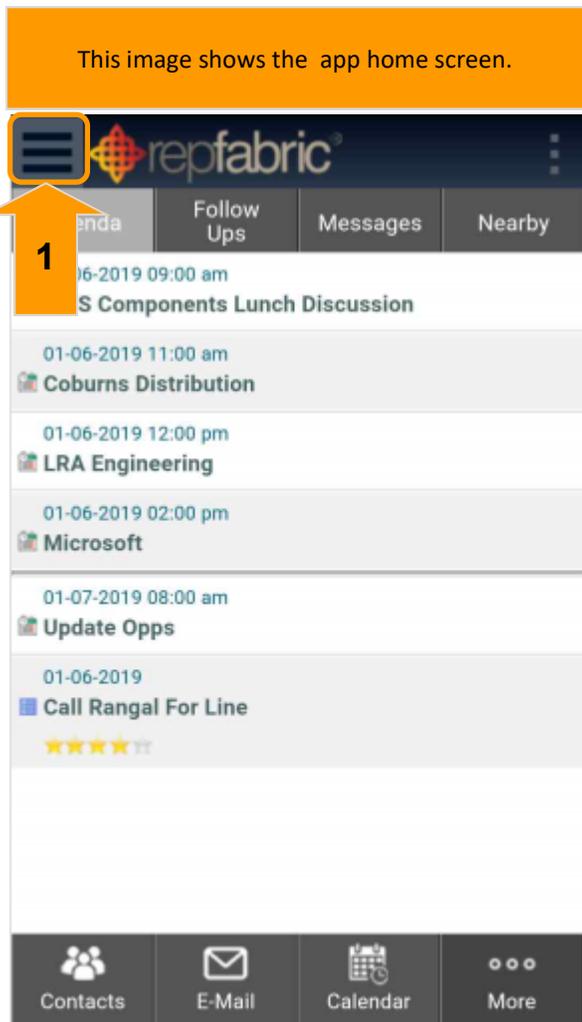
If you tap "Follow Up" above any entry, a calendar will pop up from bottom of the screen. Select a date for follow up on this entry. You can see all "follow ups" on the Home page or sort by "follow up" when viewing a list of Companies or Contacts. You can choose a separate date for each entry. Once you select the follow-up date, save the activity journal.

This concludes the instructions for this section.



How do I find Activity Journals I've already created in the mobile app?
 You can review and edit activity journals you have already completed. In addition, you will receive a daily email of activities you completed the day before.

1. Tap the “Hamburger” menu on the top left corner of the app
2. Tap “Activity Journals” to see completed journals.
3. Tap “Activity Journal Follow Ups” to see only those Activity Journals that require your attention.



Activity Journal is a list of all activity journals you have completed.

Activity Journal Follow Ups only list those Activities you have marked for follow up.