repfabric®

Need help?

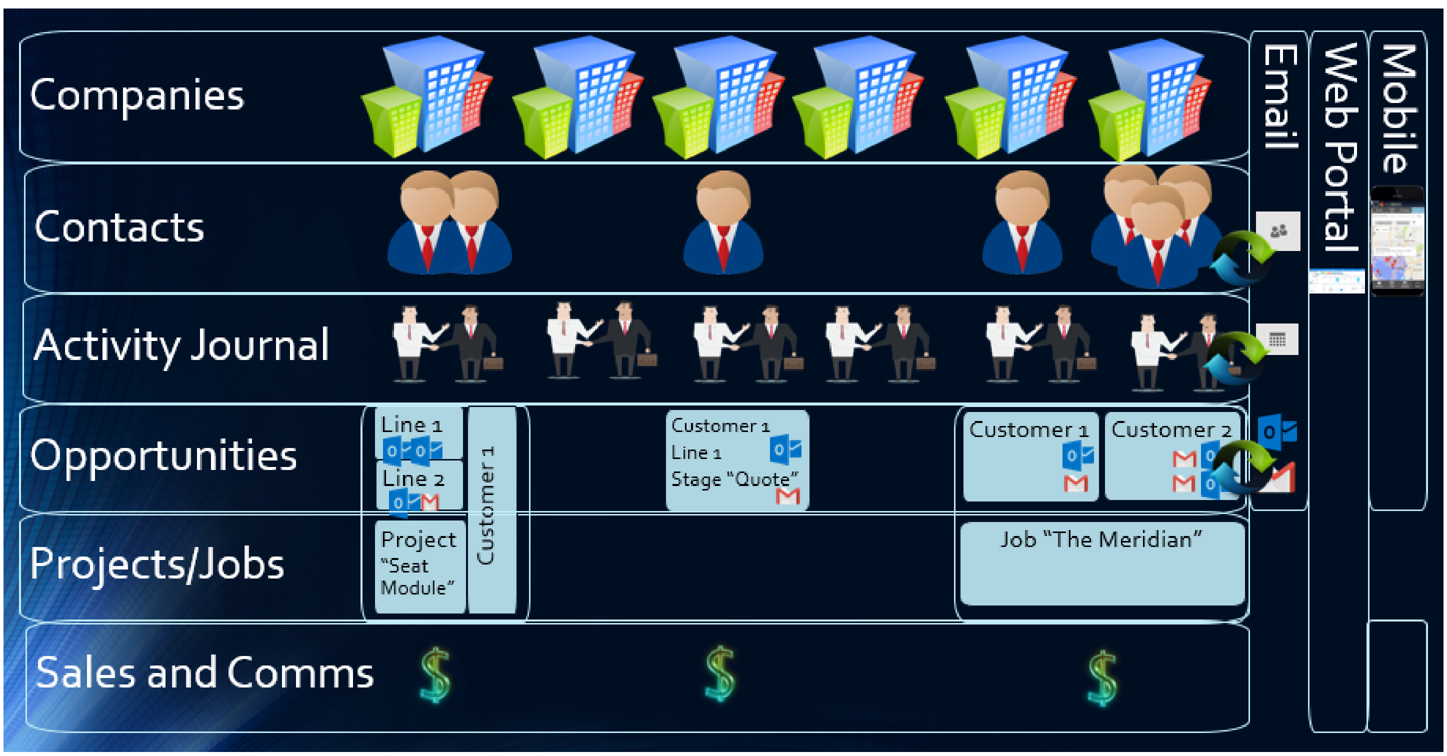
Email:
Support@repfabric.com

Or call
(844) 737-7253

For videos and more tutorials, log on to:
https://support.repfabric.com

Workbook for Sales

Connecting the threads of multi-line selling



Updated: 10/15/2022

Installation and Sign In

Company and Contact Management

Preparing for a Sales Call in Mobile

How to Make Call Notes and Reminders using the Activity Journal

After the Sales Call

Using Opportunities to track Deals

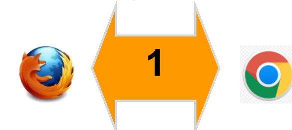
How to run Sales Reports

How to Log Into Repfabric (web portal)

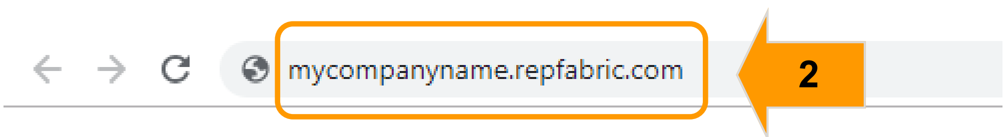
Repfabric can be reached in many ways, including the web portal, your Android or iOS device, or within Outlook or Gmail sidebars. Your company has a unique "copy" of Repfabric, known as an "Instance." This tutorial shows how to login to your company's web portal instance of Repfabric. If you do not know your company URL, please contact your administrator or check the launch letter you have received from us. **The majority of the time it is your company's website name**

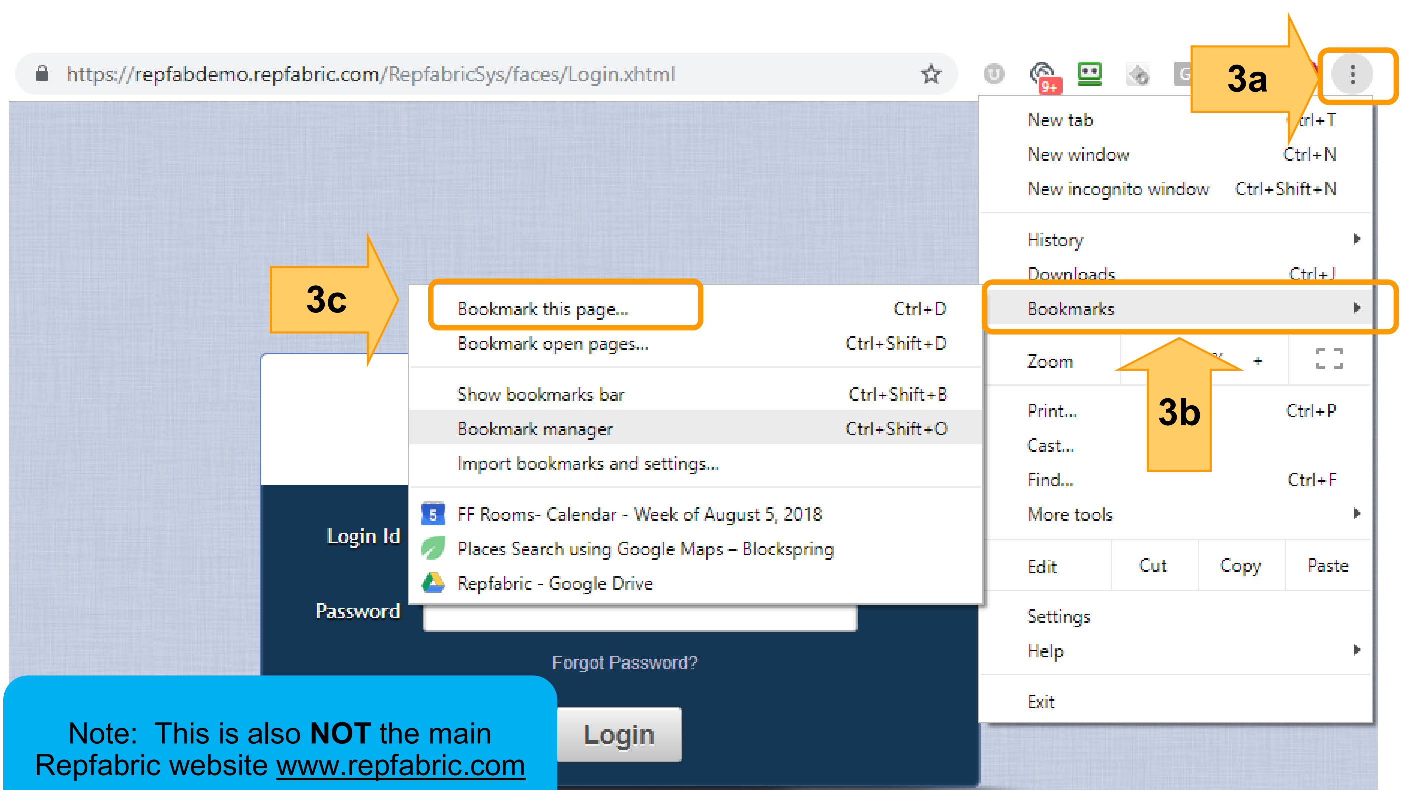
NOTE: if you are trying to login with your mobile device, please see Tutorial - How to Download and Set Up Mobile App

1. Open a web browser (Chrome or Firefox preferred)
2. Type in your company website URL followed by **repfabric.com** (Your business address will look like this: https://AcmeExplosives.repfabric.com)
3. Left click to bookmark this website to create a link to easily recall later. (Shown in Chrome)



This image shows your browser address bar.
You do NOT need the www in the address.





Note: This is also **NOT** the main Repfabric website www.repfabric.com

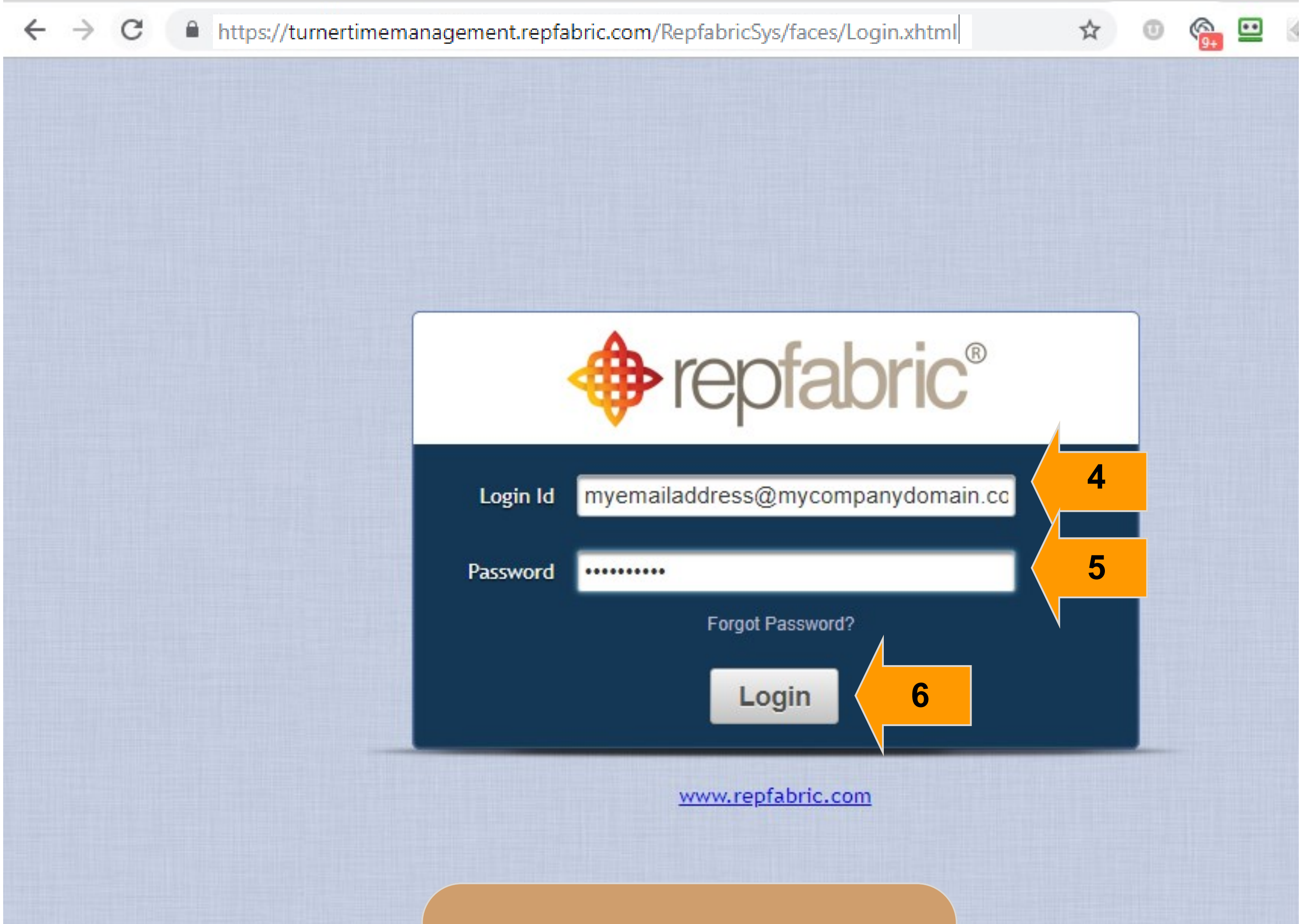
4. Enter your Repfabric user name (generally your email address).
5. Enter your initial password. Use

   "**Password1#**" if this is the first time you have logged in.

   <u>Note:</u> If your company has provided email passwords to Repfabric during data conversion, instead of "Password1#", use your email address' password.

6. Left click "Login" to go to the home screen.

This image shows a sample Repfabric login screen.



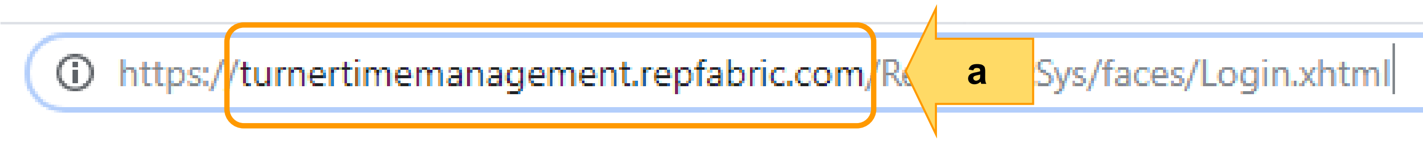
Note: Passwords **must** contain:
- ⇒ A special character (any of the following: !@#$%^&)
- ⇒ A number
- ⇒ A CAPITAL letter

Troubleshooting

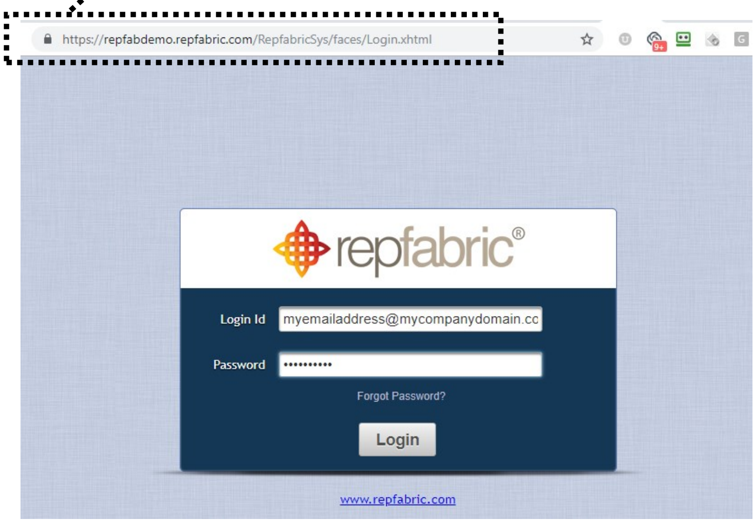
If you still cannot login, please follow these steps:

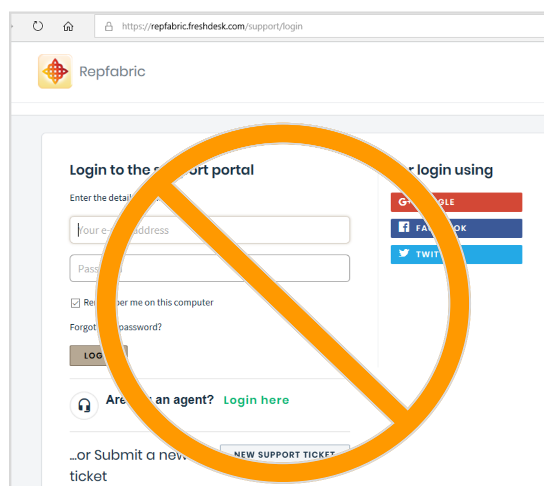
a. Am I at my company's Repfabric instance and not www.repfabric.com or repfabric.freshdesk.com ? Check your URL.
b. Do I have the correct Login ID and Password? If you are unsure, please contact your administrator or email support@repfabric.com.
c. Left click "Forgot password" to receive an email with your current password.

These images show a sample URL and
some examples that are OTHER Repfabric support sites.



GOOD





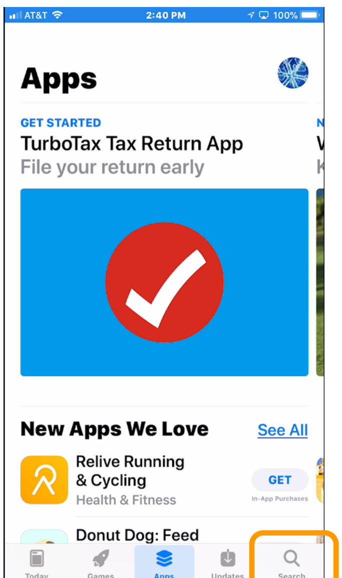
How to Download & Login to Mobile App (iPhone)

We will show the process of downloading the Repfabric CRM Tools on an iPhone.

1. Open "App Store."
2. Tap Search icon at bottom of screen.
3. Search for "Repfabric."
4. Tap "Get" next to Repfabric CRM Tools.
5. Enter your Apple ID password (or use fingerprint) to approve the download.

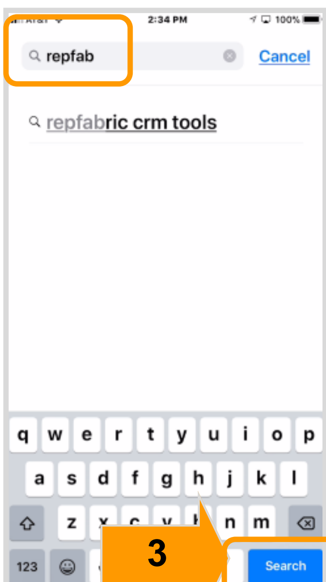
1

This image shows where you will search the App Store.



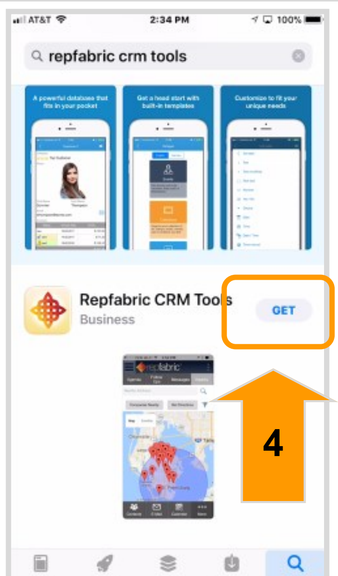
2

This image shows searching for Repfabric CRM app.



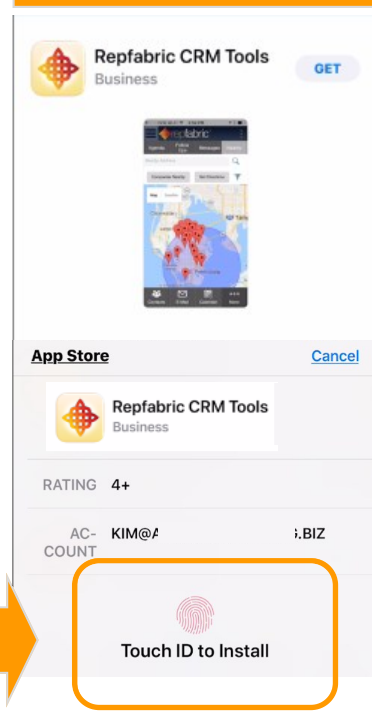
3

This image shows "Get."



4

This image shows where you will enter passcode or fingerprint.



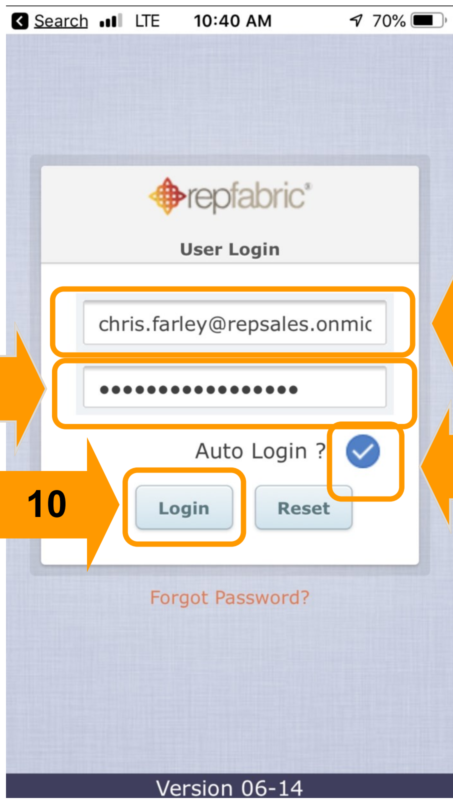
5

6. Tap Repfabric icon to open the app.
7. Enter your e-mail address.
8. Enter your Repfabric password (remember it contains a capital letter, number and special character).
9. Tap “Auto Login” for quicker access.
10. Tap “Login” button.
11. Tap “Allow.”

6

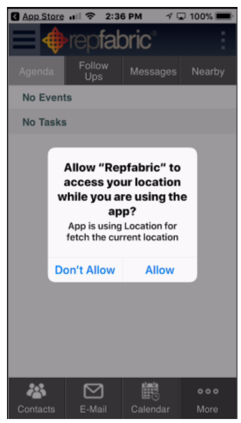
This image shows the “Login” button after you enter your credentials.

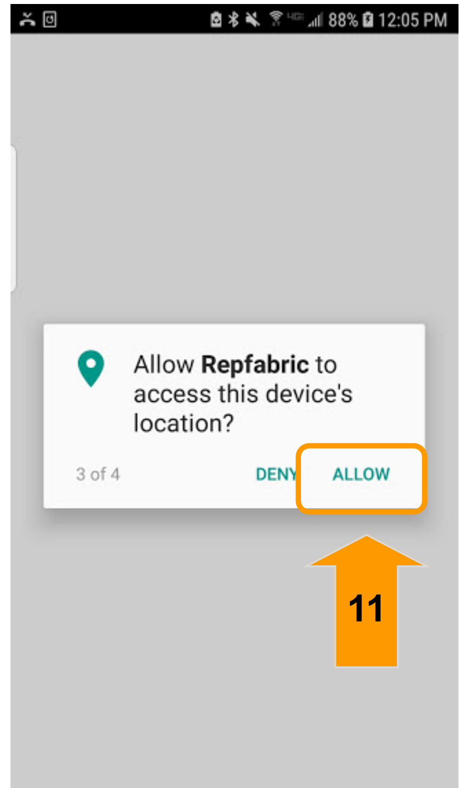
This image shows an ANDROID screen shot of where you tap “Allow.”



7
8
9
10

The iPhone screen looks like this for “Allow”

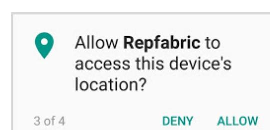




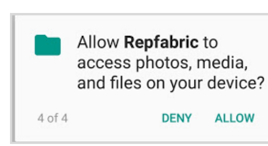
11

Repfabric permissions

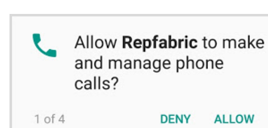
Repfabric will ask for the following permissions. Please “allow” all for maximum functionality of the app. These can be toggled off in your phone’s app settings at any time (pictures of Android permissions show here).



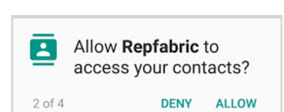
- **Location** - we can match you to nearby companies and opportunities



- **Photos** - store pictures in Repfabric that you might take at an account (i.e. competitors parts or schematics/drawings, showroom floor, etc.).
- **Phone** - so you can call customers directly from within the app



- **Voice Dictation** - so you can dictate your call notes and opportunity updates with your voice



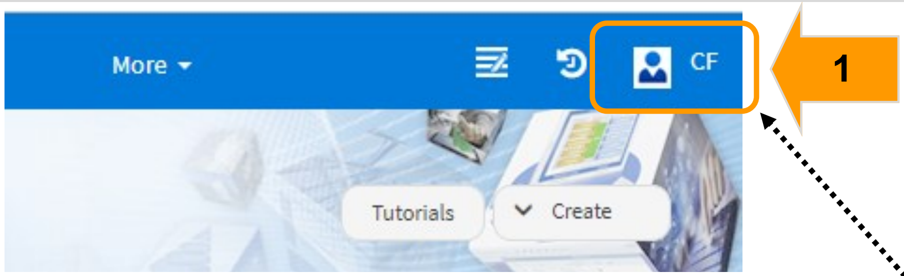
Your privacy is of utmost importance to us. We do not track or inspect any of your information unless you are using the app for the purposes above.

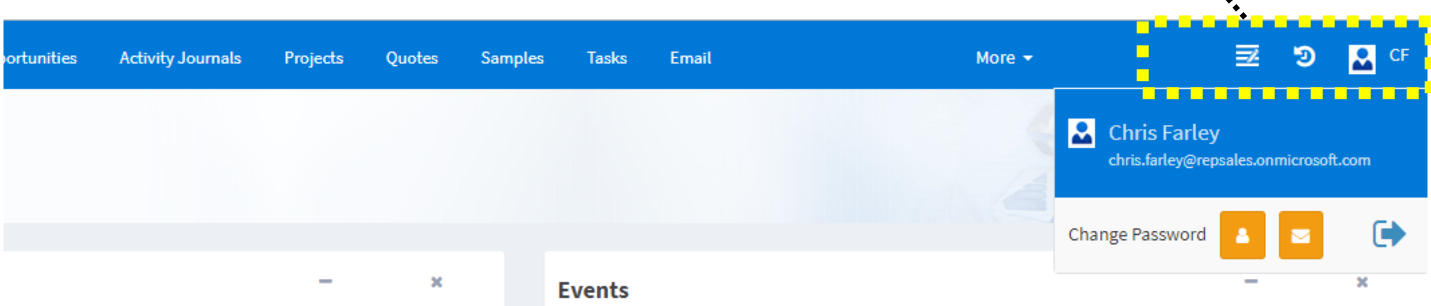
How to Reset your Repfabric Password

When you need to change your login password to the Repfabric web portal and the mobile app, please follow this tutorial.   Note: Your web portal password is one of the three passwords you should save for access to Repfabric (the other two are the email password to your email system and the password to the Repfabric Helpdesk.)

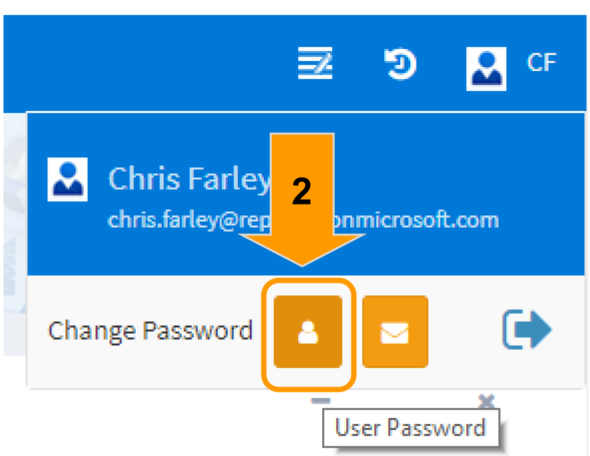
1. On the Home page left click your initials (or your picture).
2. Left click “User Password” button.
3. Enter your desired Repfabric password (a Special Character [!@#$%^&*], Number and Capital letter are required)

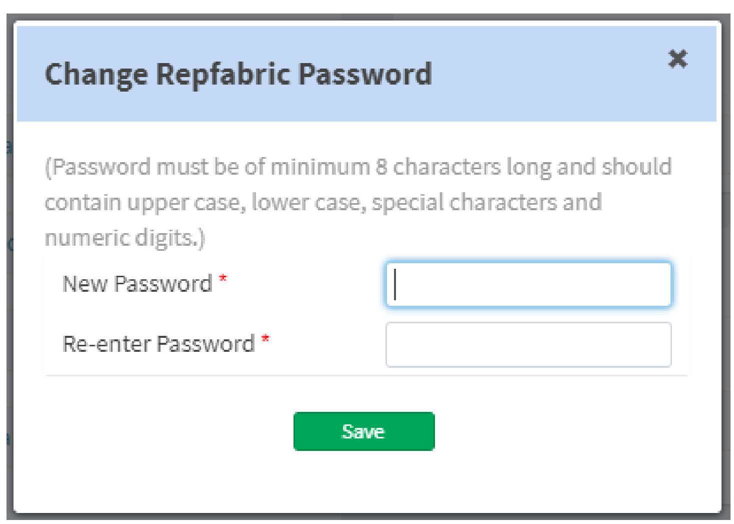
This image shows the new Repfabric Home Page.





This image shows the menu to “Change Password”

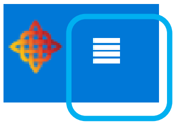




How to Edit Shortcut Menus (Favorites/Bookmarks) in Repfabric

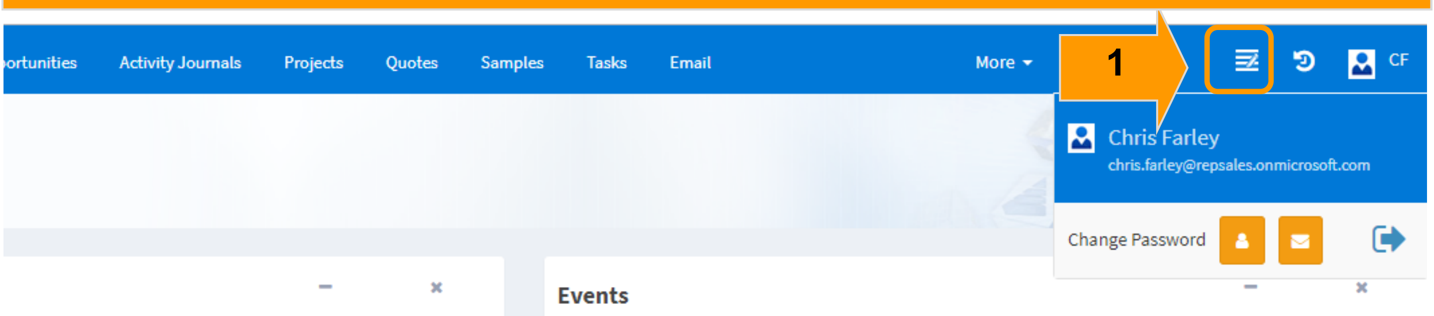
You can customize the menu bar to include shortcuts to the menus you use most often in Repfabric. Think of it like a ‘bookmark’ or ‘favorites’ bar in Chrome or Internet Explorer. Initially the blue menu bar across the top is populated with items we think you’ll use most.

You can *always* access all of Repfabric by left clicking on the icon for the global menu (sometimes called the double hamburger). You can create shortcuts or “quick links” to the modules you use the most.

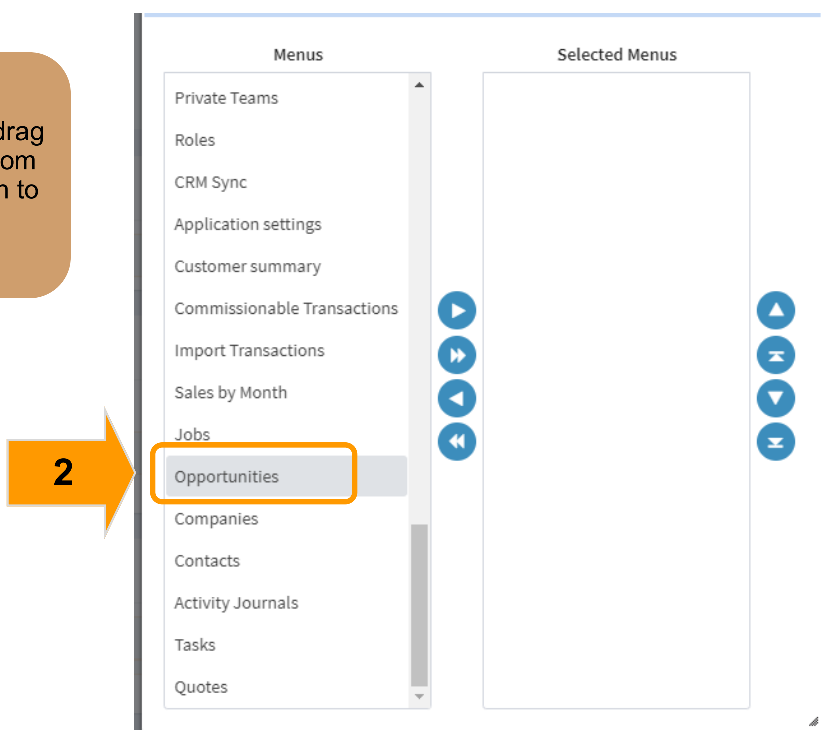


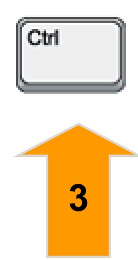
1. On the Home page left click “Edit Shortcuts” icon in top right corner.
2. Scroll down, left click desired menu item (in this example “Opportunities.”
3. Hold down CTRL Key.

These images show the menu bar with most used shortcuts already in use and you can customize it to fit your needs.



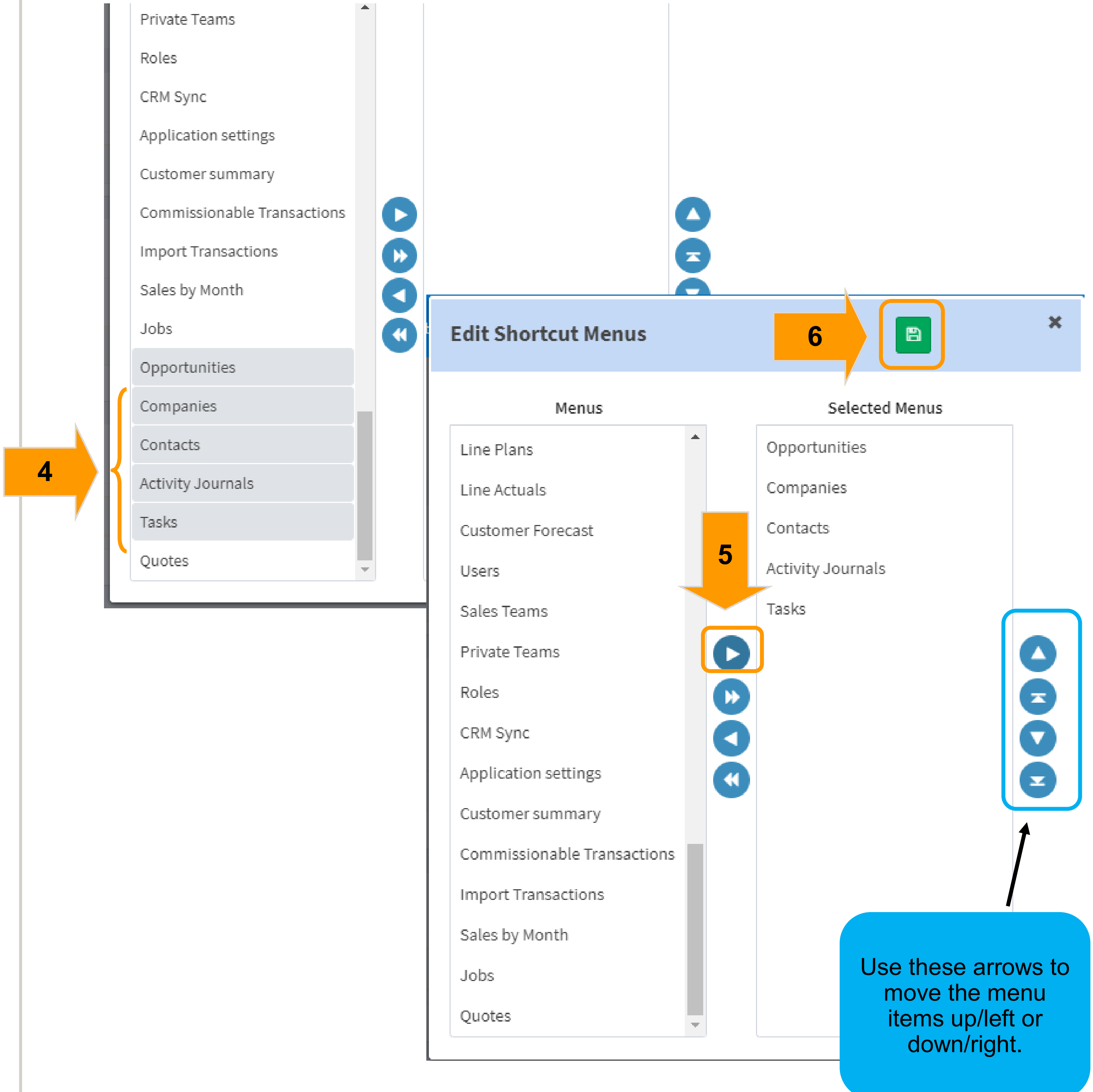
You can also drag menu items from the left column to the right.





4. Left click additional Menus to move (continue holding down CTRL key).
5. Left click "Move" arrow.
6. Left click "Save" icon.

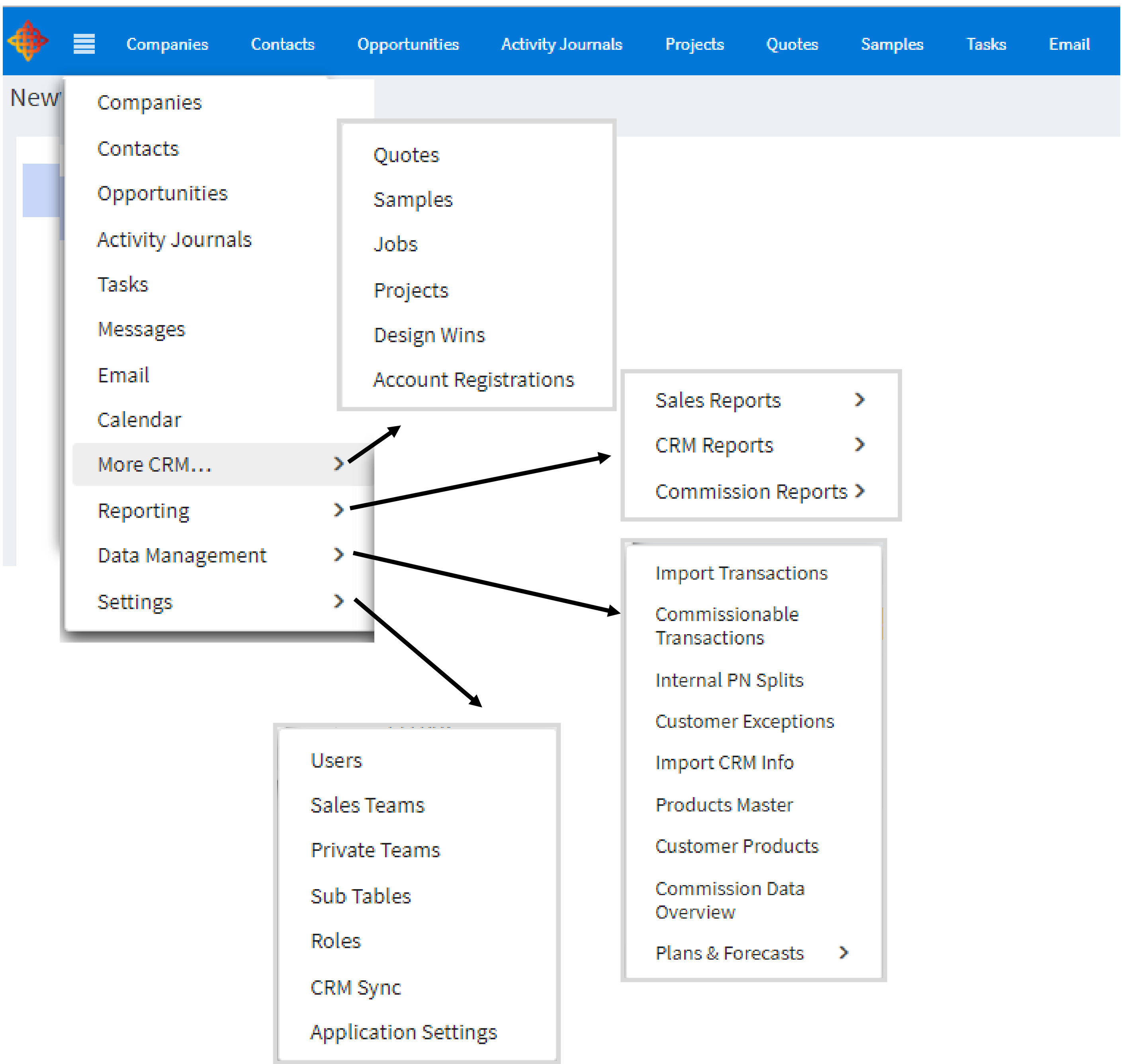
These images show examples of Shortcut Menus you may want to use.



The 'Global Menu'

The global menu icon (or the double hamburger) is ***always*** available, no matter how you set up your menu shortcuts across the blue banner at the top of the page. You will have to use it for all the Repfabric menus you don't have room for in your "favorites" in the blue bar.

These images show the menu options available under "More CRM..", "Reporting", "Data Management", and "Settings"



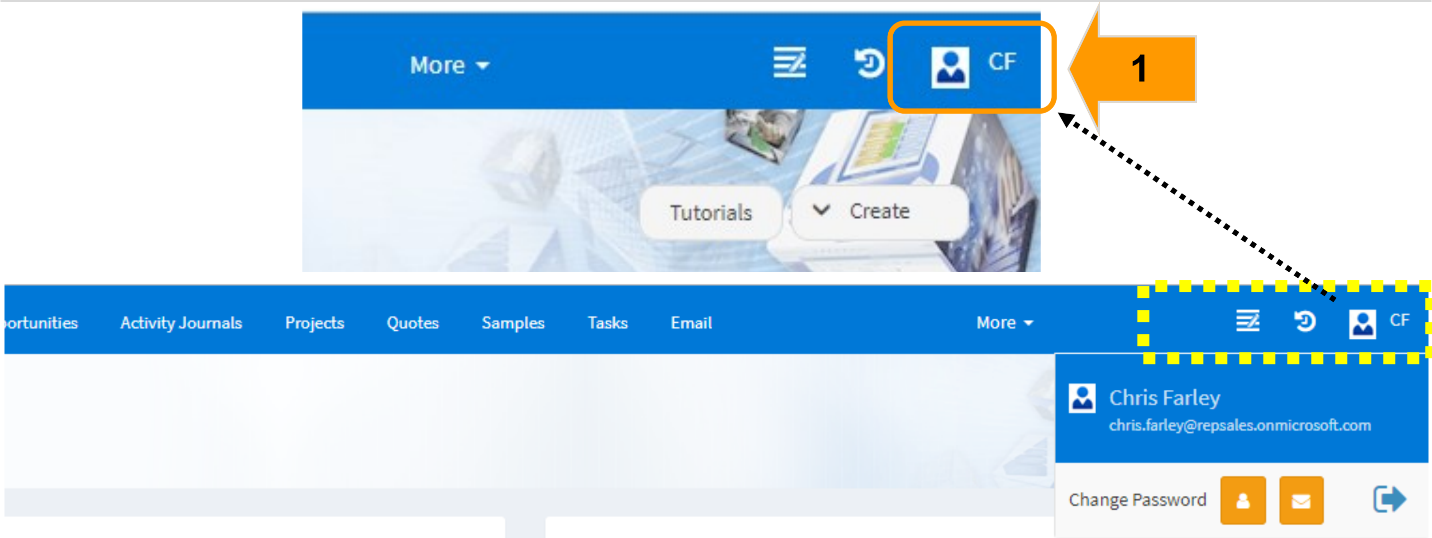
How to Enter your Email Password into Repfabric (web portal)

In order for Repfabric to link emails to contacts and opportunities, Repfabric needs to download emails from your inbox. In order to accomplish that task, Repfabric needs your email password. Emails will be downloaded every 5 minutes from your inbox and from your sent items into Repfabric. ***If you change your password for Outlook/Gmail, you will need to do this process in Repfabric.***

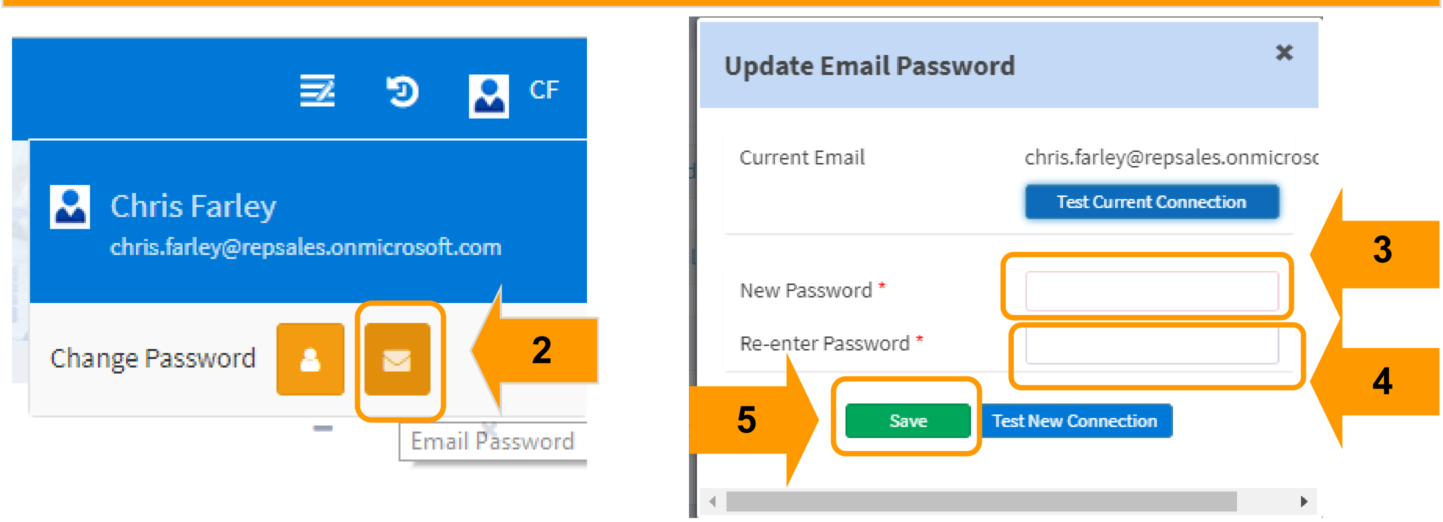
Note: Your email password is one of the three passwords you should save for access to Repfabric (the other two are the web portal password and the password to the Repfabric Helpdesk.)

1. On the Home page left click your initials (or your picture).
2. Left click “Email Password” button.
3. Type in your new password.
4. Type the password in a second time.
5. Left click “Save” button.

This image shows the new Repfabric Home Page.



These images show the menu to “Update Email Password.” **If you want to see if the connection is working, either before or after changing your password, use the “Test Current Connection” or “Test New Connections” buttons.**

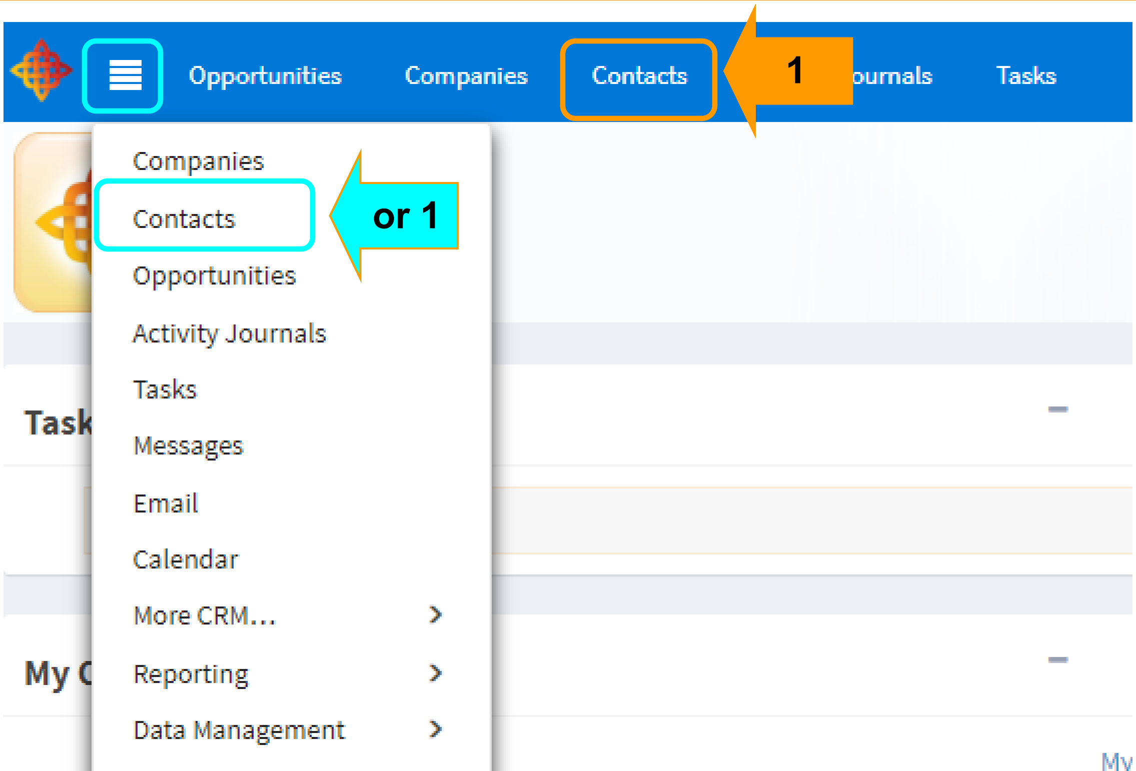


How to Create a New Contact in Repfabric (web portal)

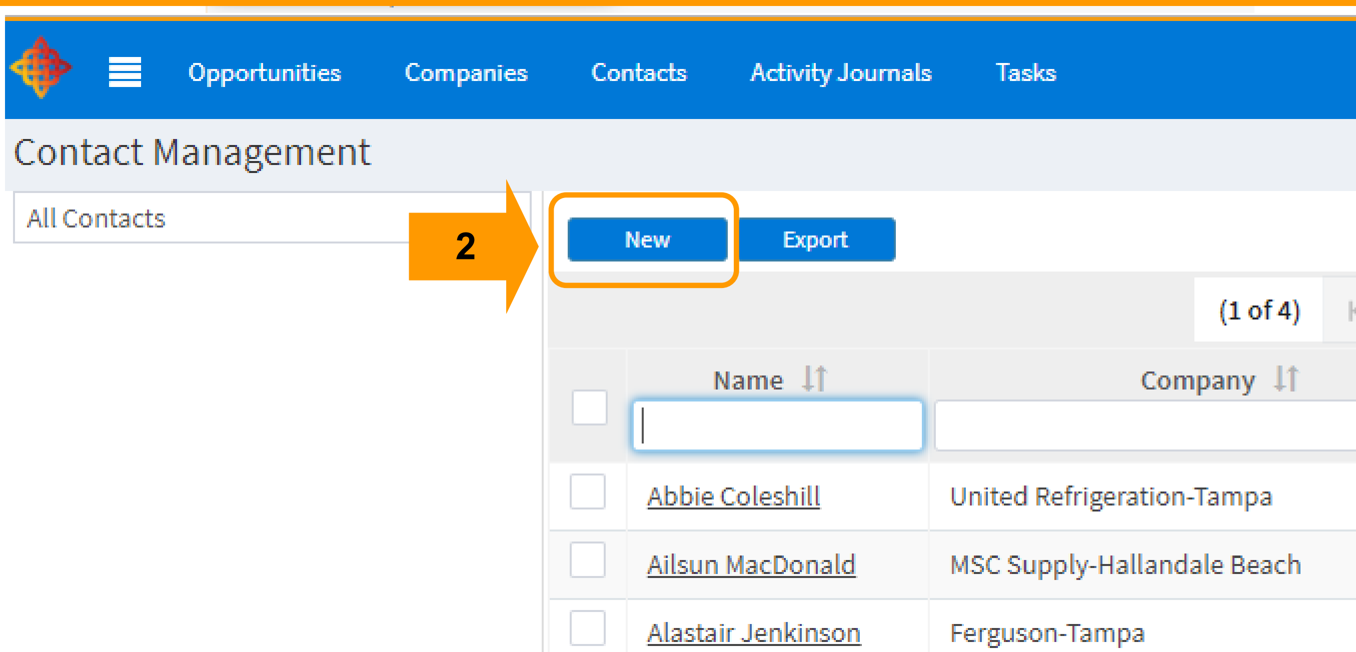
Contacts should always be tied to a Company.

1. Left click "Contacts" (if you do not have menu shortcuts set up, use the menu bars
2. Left click "New" button.

This image shows two examples of where you might find "Contacts."

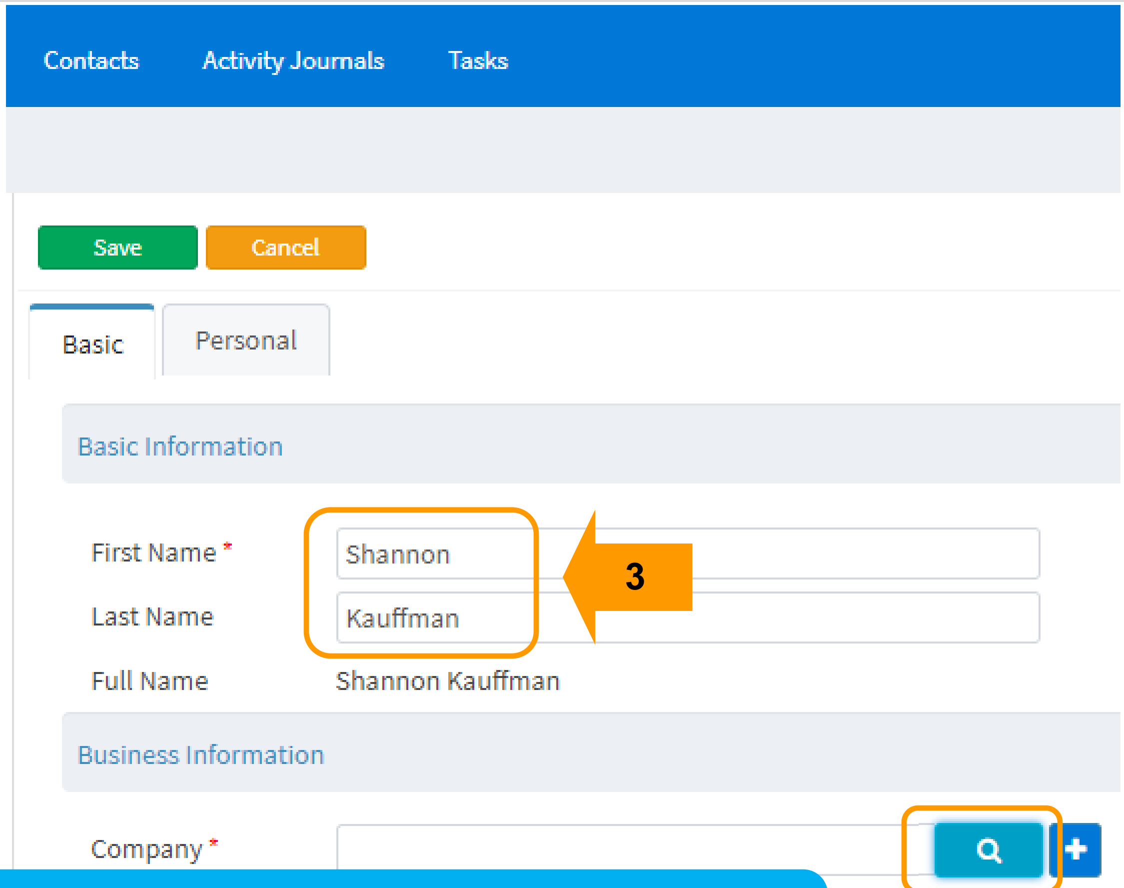


This image shows the "New" button.



3. Fill in “First Name” and “Last Name” (the “Full Name” field will auto populate).
4. Left click magnifier to search for “Company” (type first few letters to narrow search).
   If you need to add a Company now, see page 16.
5. Left click desired company.

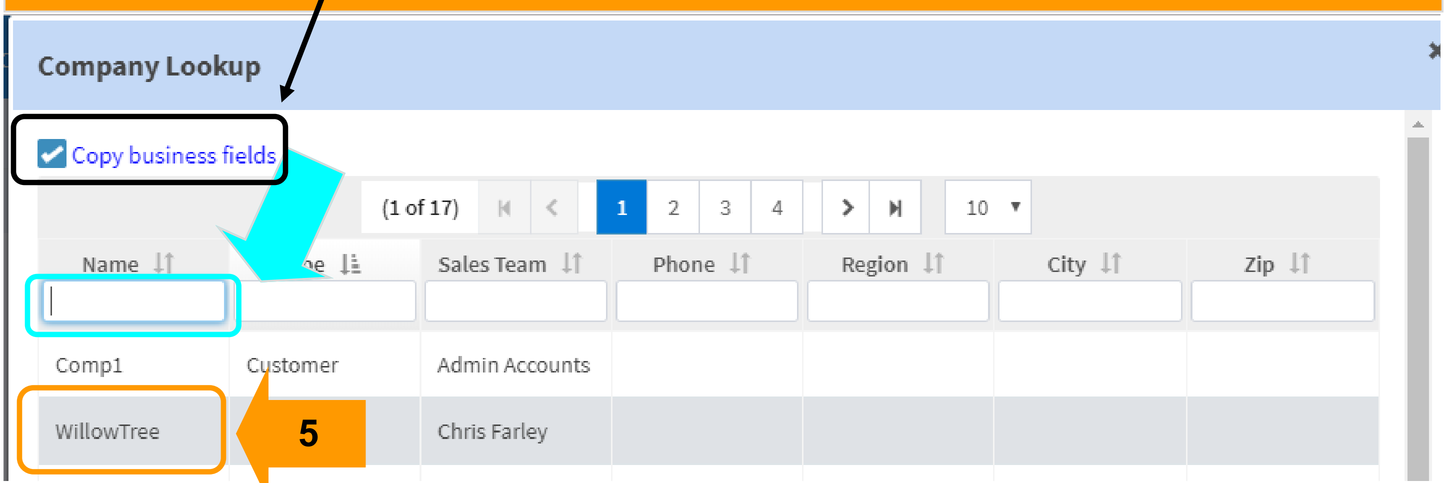
This image shows where to enter “First Name” and “Last Name.”



“Copy business fields” will add the address and phone number information of the company selected to this contact record.
It will **NOT** overwrite any fields you have already filled in.

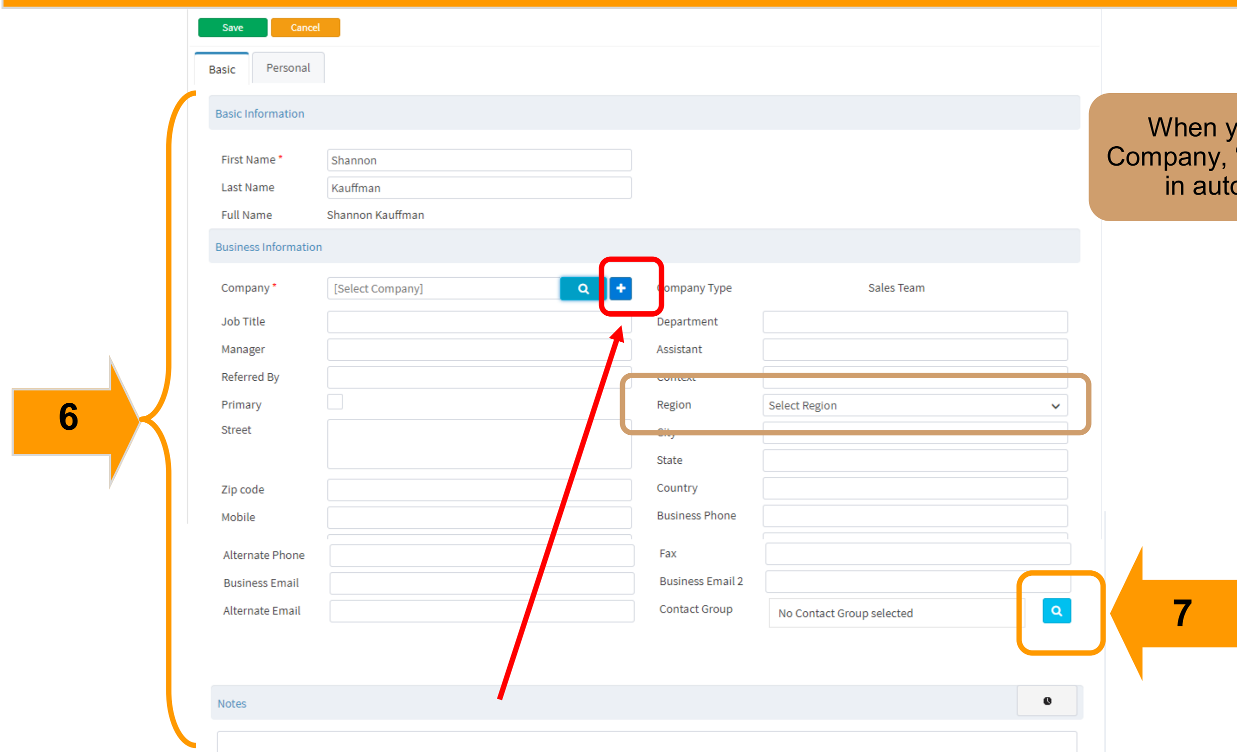
4

This image shows an example customer to choose. You can search for customers by name in the box at the top of each column.



6. Fill in all applicable blank fields that you have information for. (*For this new contact, best practice is to assign it to a company.)*
7. Left click magnifier for "Contact Group."
8. Select desired "Contact Group" (select as many as needed).
9. Left click "OK."

This image shows all the fields in a Contact in the "Business Information" section.



When you fill in the Company, "Region" will fill in automatically.

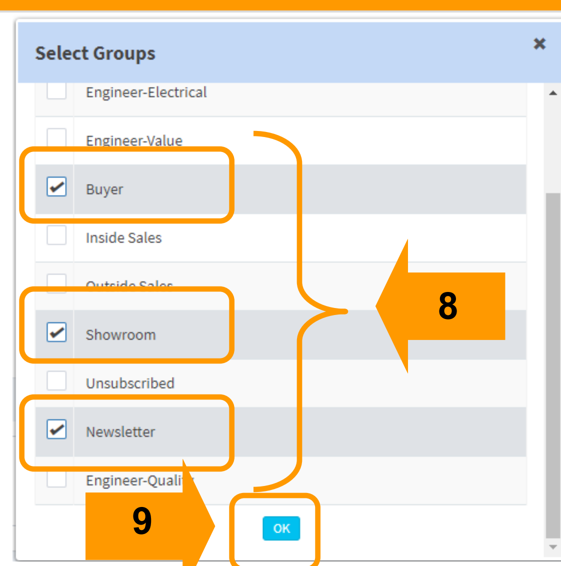
You can create a new company (if it doesn't exist), while creating the contact

Left click the "+" icon and add the new company.

See the next page for instructions on how to create a company from scratch (instead of creating it while creating a contact). It also shows the details on each of the fields within a company record.

This image shows some example Contact Groups to select for this contact.

Contact Groups in Repfabric can sync with your "Categories" in Outlook. This is NOT personal categories to each individual. As a group, you should decide what "Contact Groups" you will use in Repfabric. Then *each person* should create those ***exact categories*** in Outlook.
There are some examples shown here.

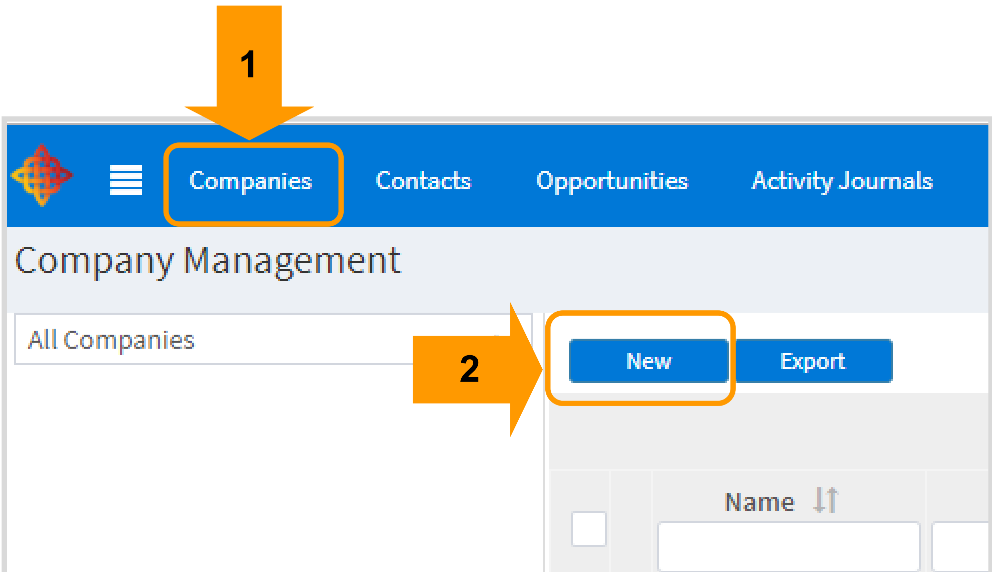


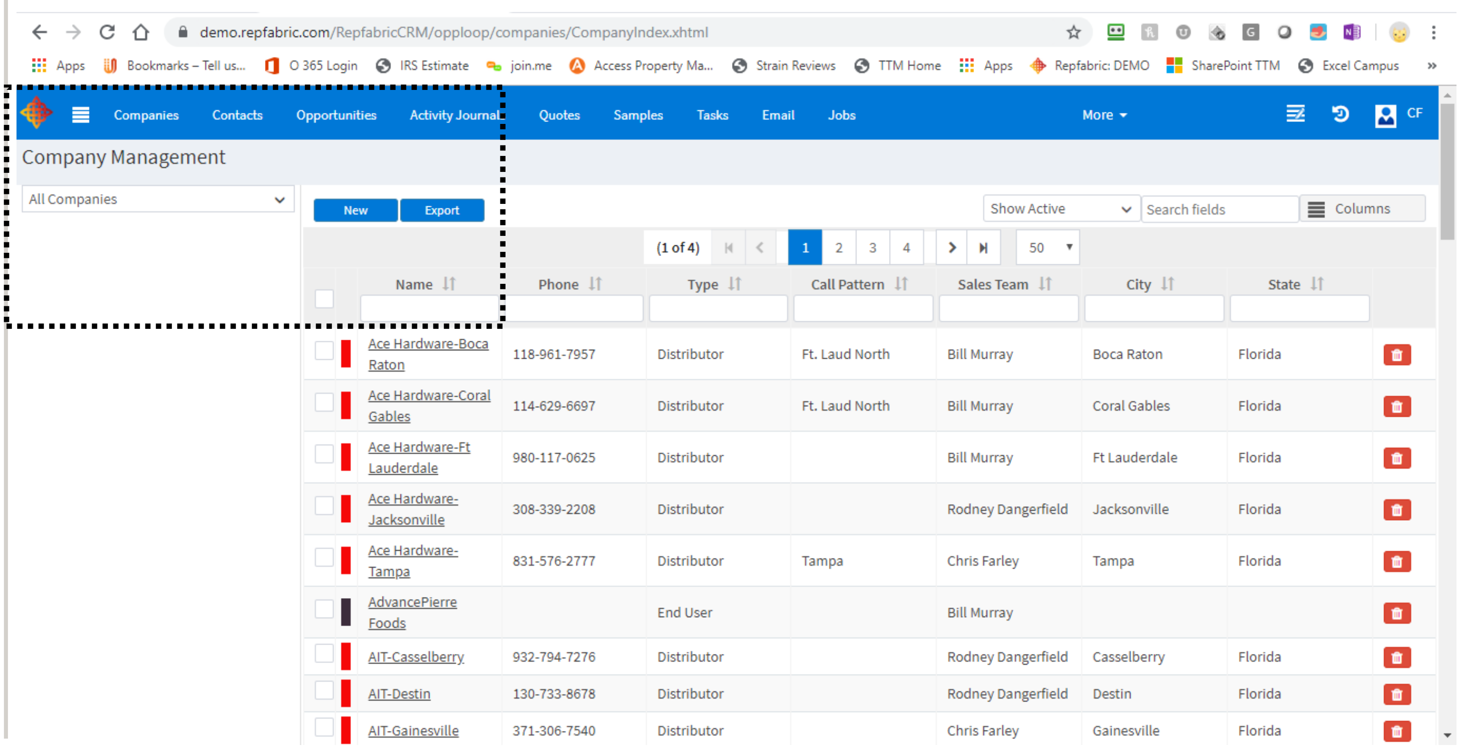
How to Create a New Company in Repfabric (web portal)

A company can be a customer or end user, distributor, manufacturer, etc.

1. Left click “Companies.”
2. Left click “New.”

These images show where to find menu shortcut for “Companies” and the “New” button.
A Portion of the image has been enlarged to show better detail.

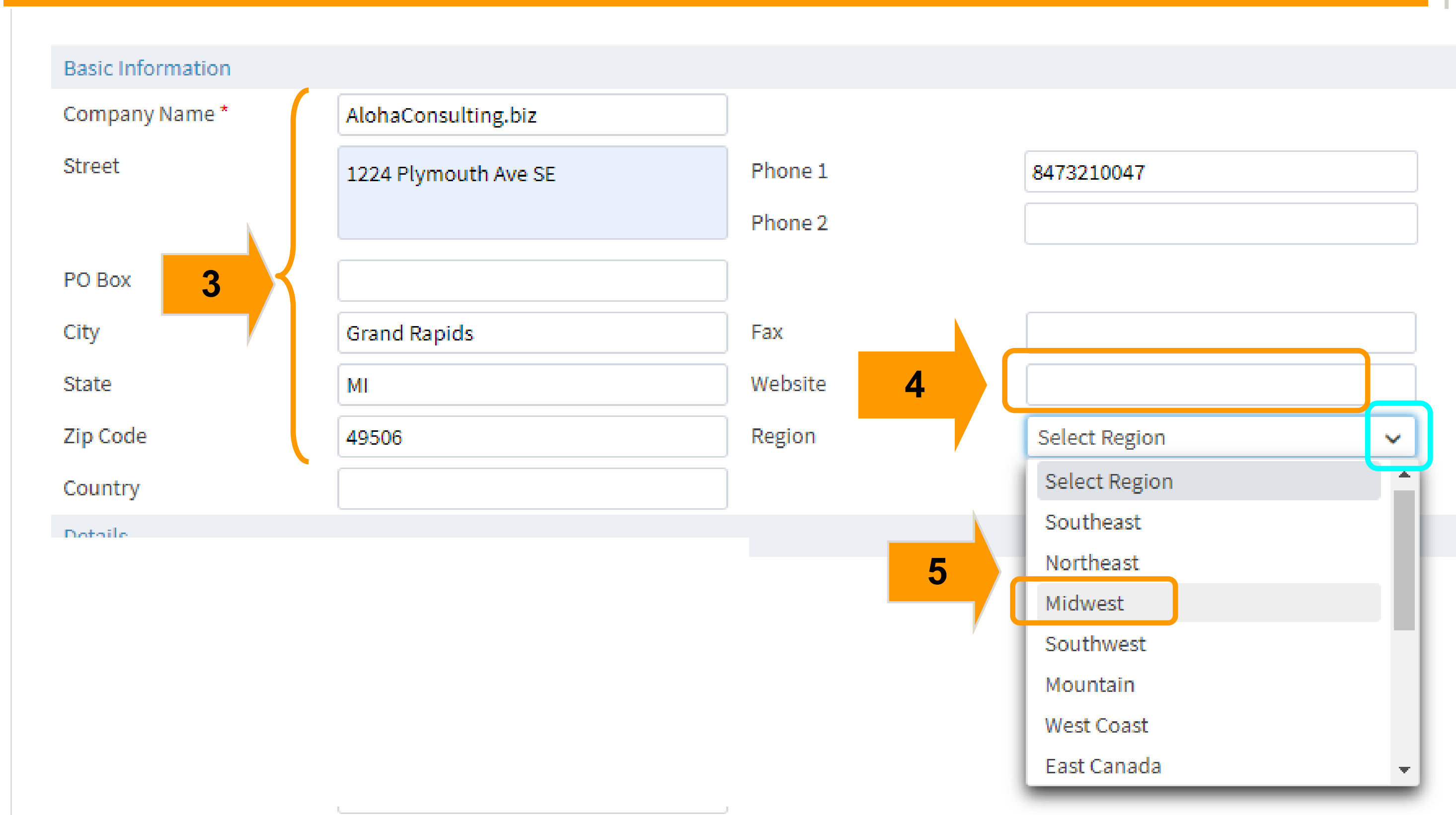




3. Fill in address and phone numbers.
4. Fill in the company web address (leave off the “www.”)
5. Left click drop-down to select “Region.”

By filling in the
he Website field, any time
Repfabric finds a contact’s email
address ending in that one and
only domain, it will link the contact
to the company automatically.

This image shows the address and phone fields as well as examples of drop-down options for “Region.”



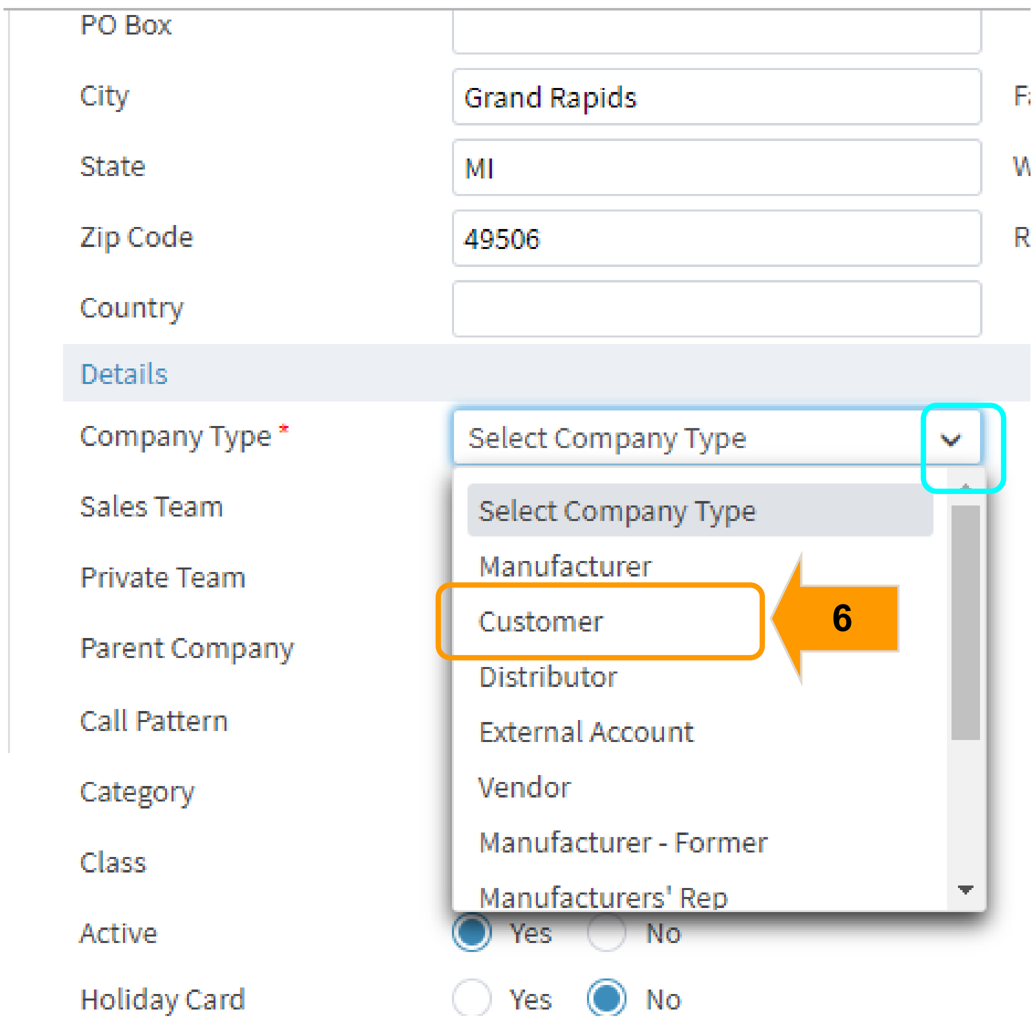
Company: Region

Each company breaks their territories down in different ways, often consistent with their sales people’s responsibilities. (i.e. Midwest, Southwest, Westcoast, etc.). Above are some sample regions. This will allow you to look at your numbers in many different ways if you use this field when you create a new (or edit existing) company. A region groups several accounts together (regardless of sales team) for reporting sales growth and opportunity funnel information.

Other fields are used to classify and sort companies in the mobile and web portal views. Complete as much as you know to enable more detailed reports.

6. Left click drop-down and select "Company Type."

This image shows example drop-down fields for "Company Type."



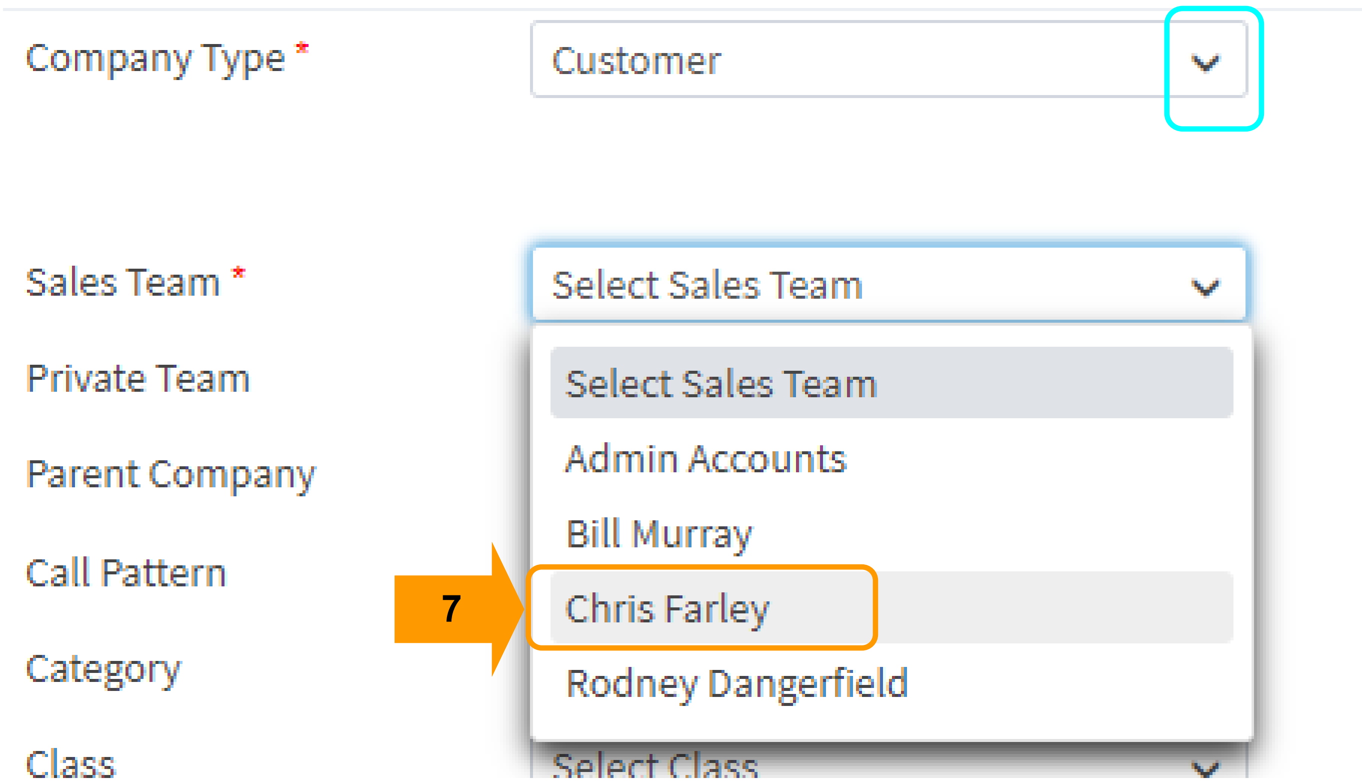
Company: Type
The default company types are:

- Manufacturer (or principal)
- Manufacturer-former
- Customer
- Distributor
- Vendor
- Manufacturer's rep.

You administrator can define additional company types, in (sub-tables) that further describe your customers. Some examples include OEM, CEM, Architect, Engineering Firm, Operator, Panel Shop, and Facility. Any new company type can be flagged to behave like a customer where you can assign a sales team, create opportunities, and load sales numbers for that company. It also means, commission splits can be assigned to that account.

7. Left click drop-down and select “Sales Team.”

This image shows example drop-down fields for “Sales Team.”



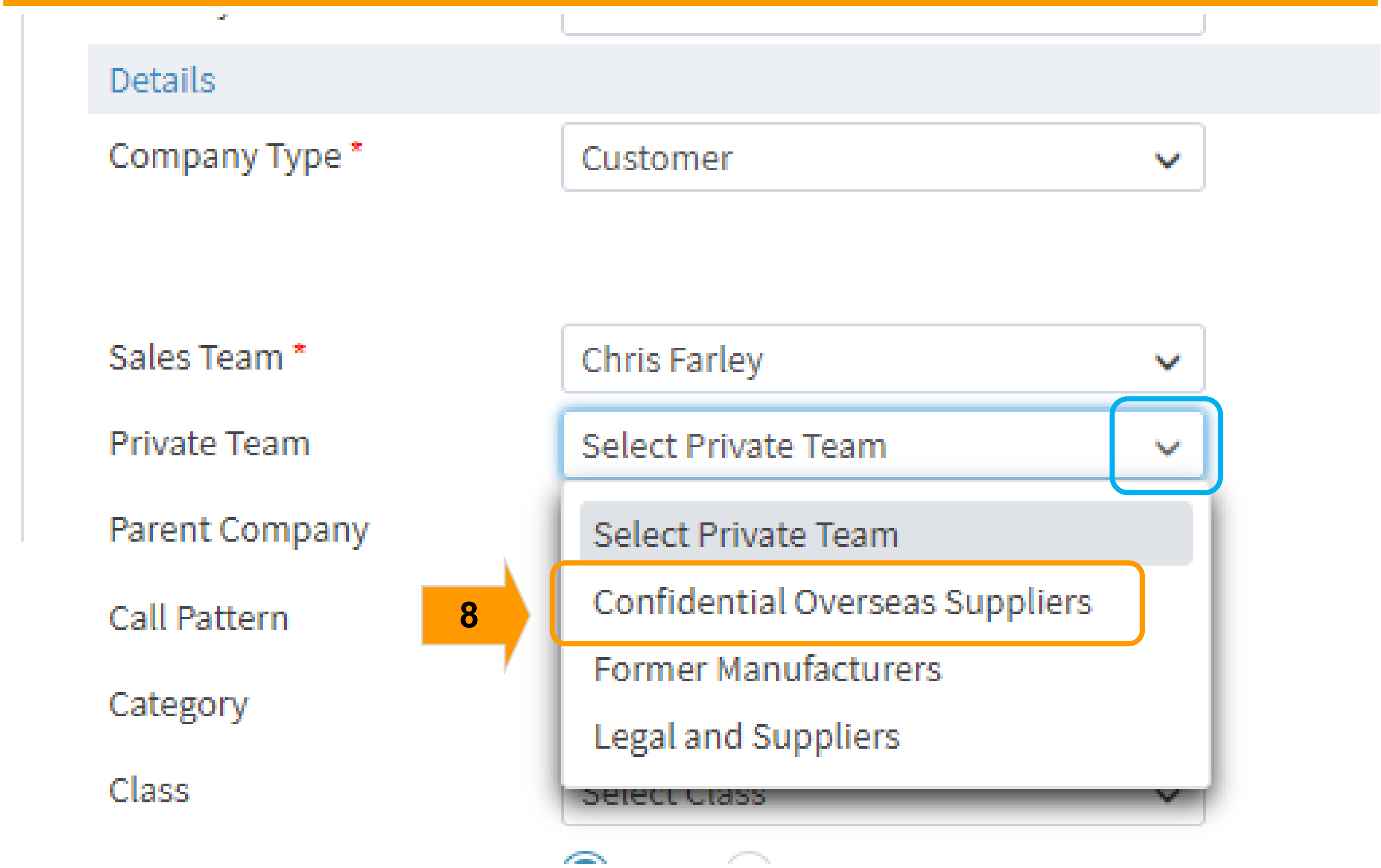
Sales Team

Sales Teams are used to define which persons within your company are responsible for selling and servicing this account (if they are not a line). Sales teams also determines who can actually see sales numbers, opportunities, activity journals, contacts, etc. So if a inside rep also works with this account, they will need to be on that sales team. *Remember, individuals can be assigned to multiple sales teams.*

In this example, any individual user assigned to the ‘Chris Farley’ sales team will be able to view and edit this company record, contacts at this company, opportunities and activity for this company. He or she can also view sales and commission numbers for this company if their user menu options are set to allow it by your administrator.

8. Left click drop-down and select “Private Team.”

This image shows example drop-down fields for “Private Team.”

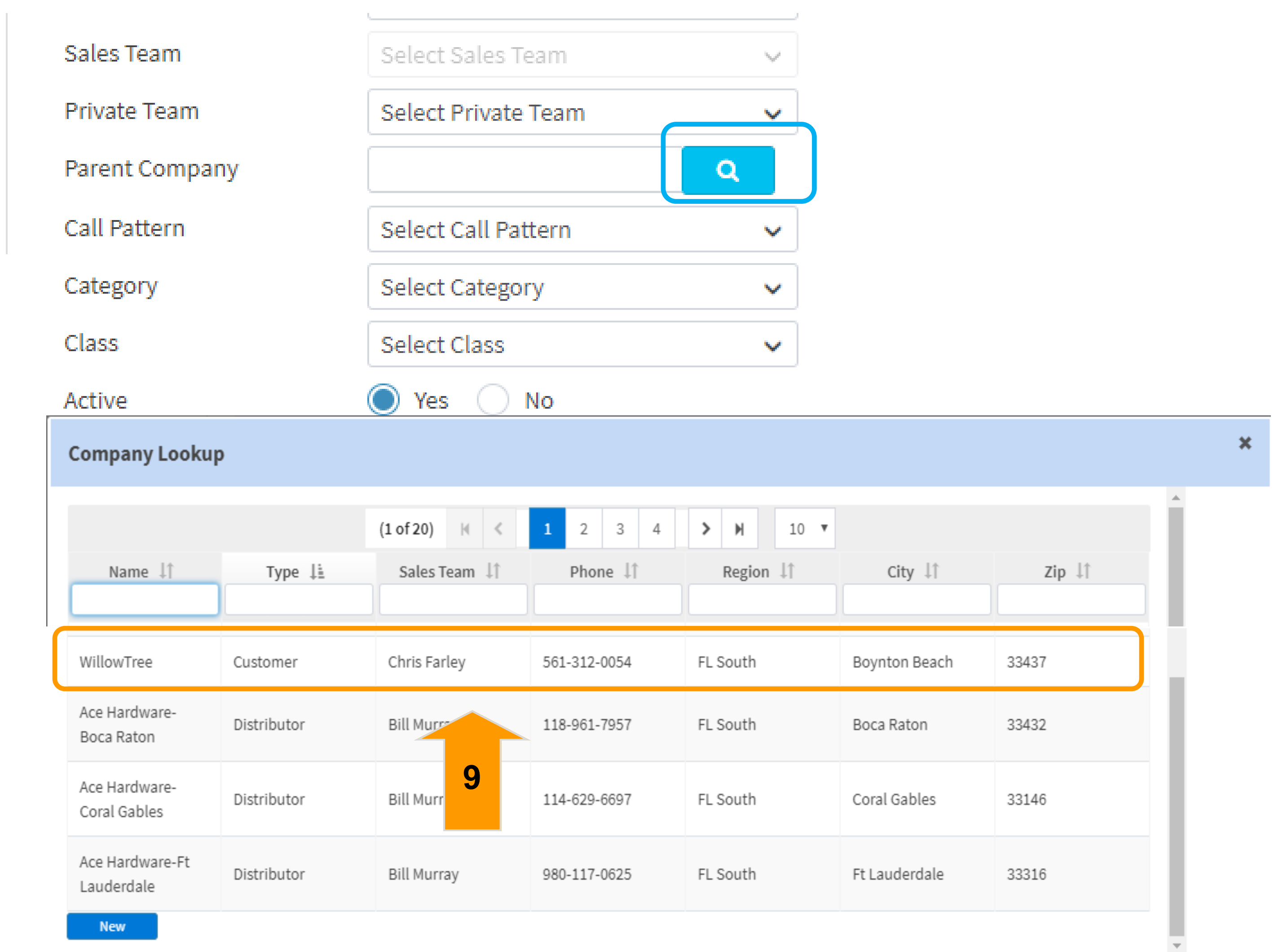


Private Team (OPTIONAL)
This setting prevents a company from being viewed by any individual user NOT on the “Private Team.” This includes contacts, opportunities and anything else associated with this company. A common use of this feature would be when the owner wants to keep certain contacts private (i.e. the company’s accountant, lawyer, or a contact at a former manufacturer).

If options you would like to select are not available, contact your administrator whom can add the options in the “Company Subtables” in the Repfabric configuration.

9. Left click magnifier and select "Parent Company", if applicable.

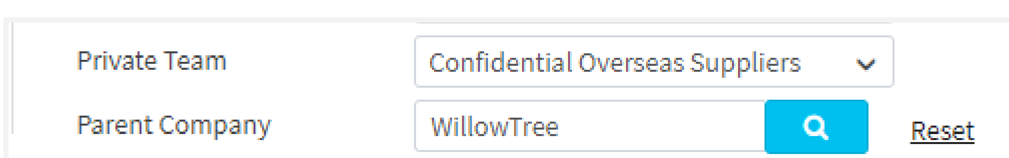
This image shows an example lookup for "Parent Company."



Parent Company

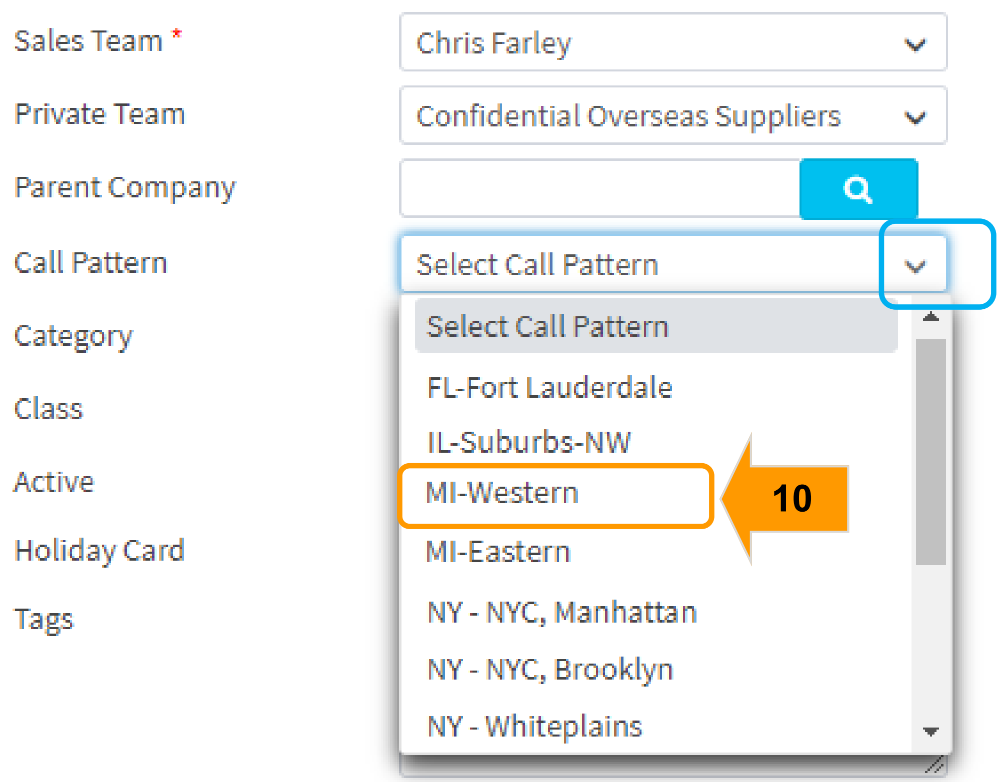
Parent company can be used to associate a branch, ship to, etc. with the main company (sold to) or headquarters location. It's a way to roll up top-line sales to a parent company. It also creates a link for all contacts within that company.

You can always change or "Reset" the parent company later if you need to.



10. Left click drop-down and select “Call Pattern.”

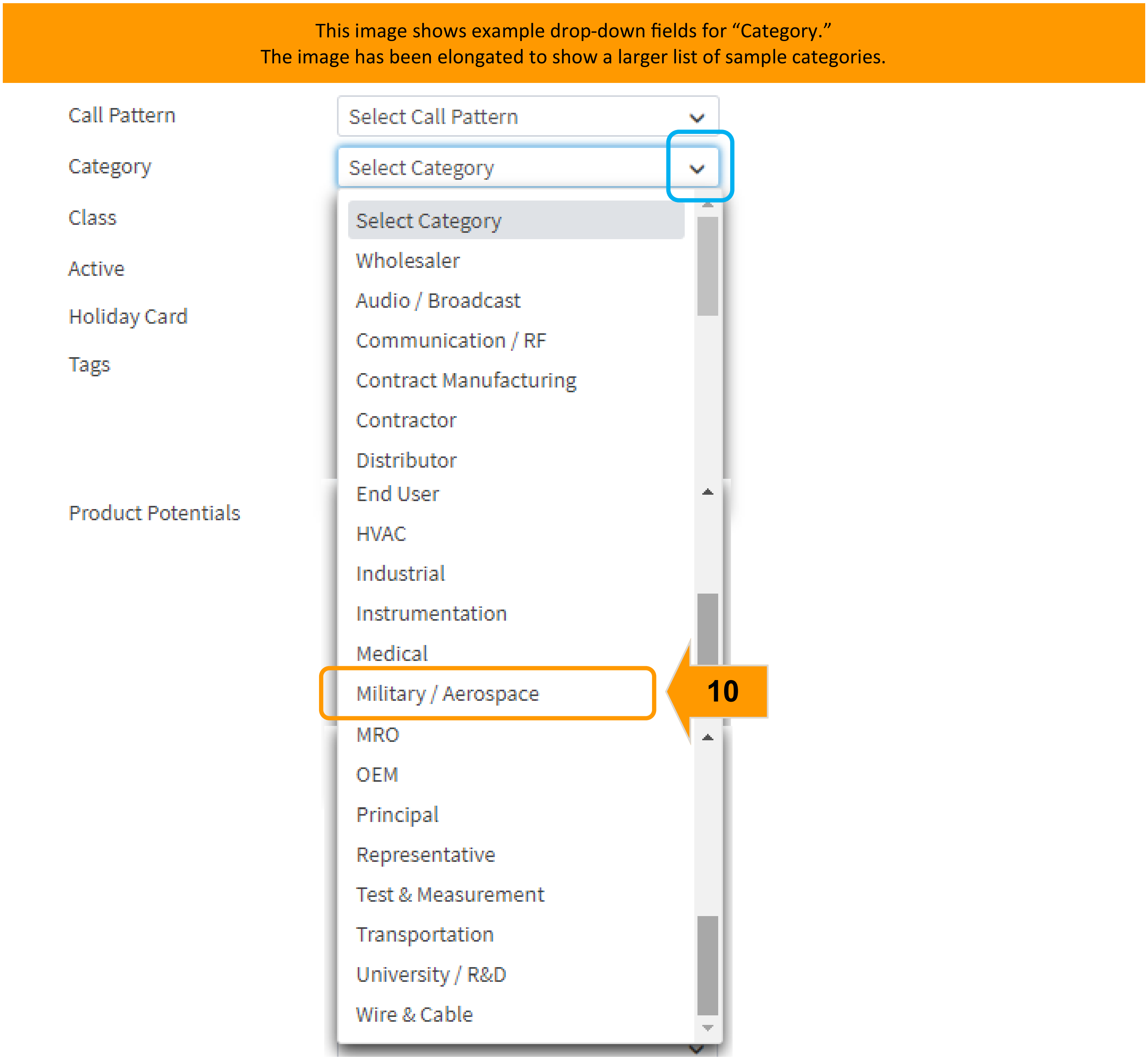
This image shows example drop-down fields for “Call Pattern.”



Company: Call Pattern

Call pattern is a method to group accounts that you’d make sales calls on in a half-day or one day block. An example might be the NY Financial District, Brooklyn, or Mid-town. As a salesperson you would probably go to one or two of these areas in a given day and would see as many customers in that “Call Pattern” as possible. Some sales people research this today searching companies by zip code. “Call Pattern” allows you to stop at accounts that may be on the way to a group of companies in your final “Call Pattern” area by adding them to that call pattern even if they are not in that final zip code area of your main calls.

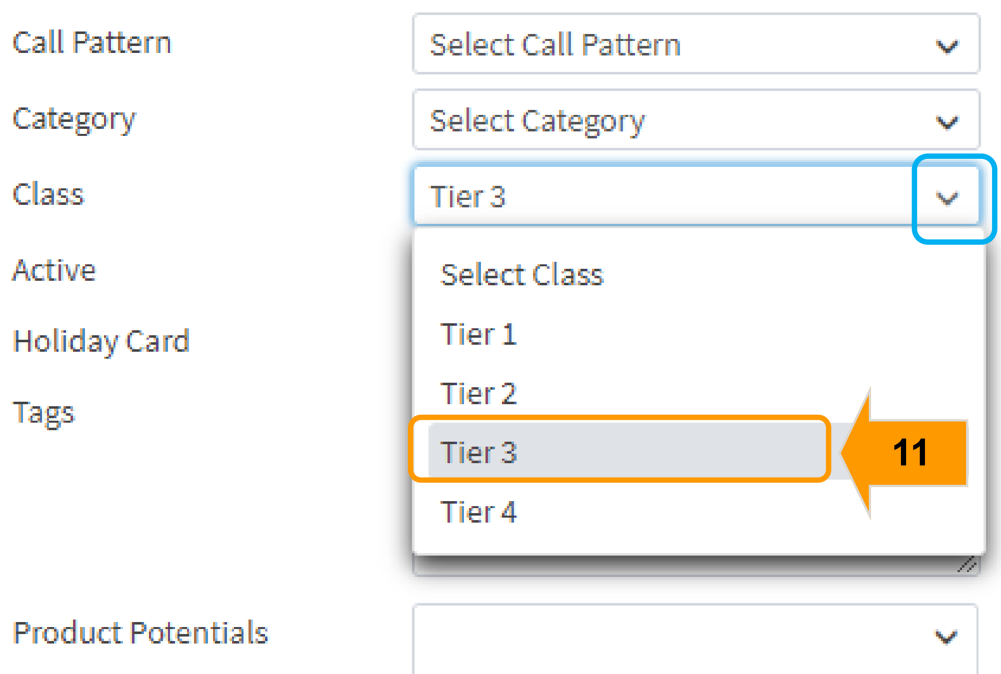
10. Left click drop-down and select "Category ."



Company: Category
This can be used to help segment what specific industry the account is in or type of business they conduct. It could be industrial, government, military, commercial, private enterprise. This can be used however it is most helpful to your organization.

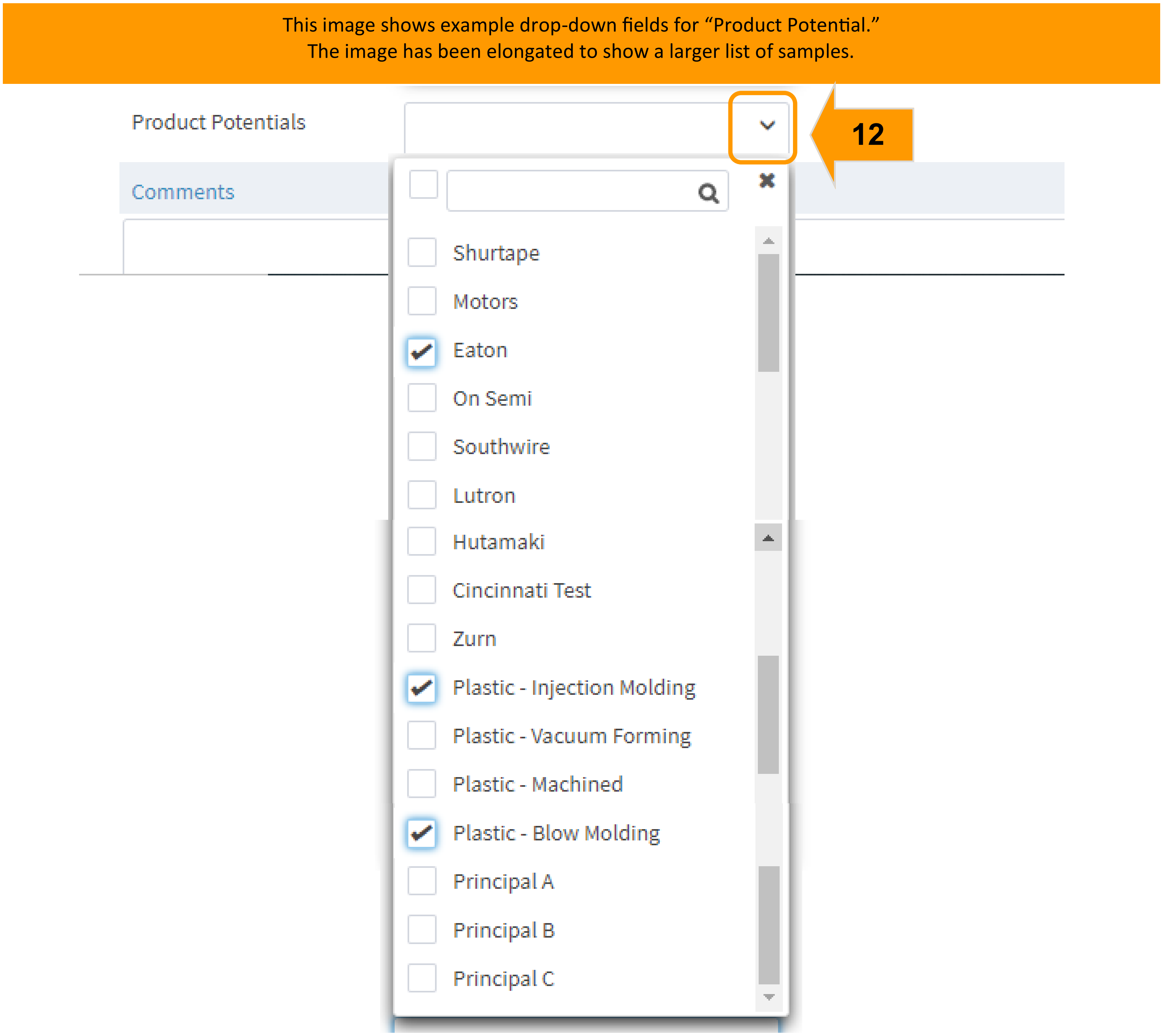
11. Left click drop-down and select “Class .”

This image shows examples for “Class.”



Company: Class
How big is this prospect or customer? Some samples of how to use this are already in your instance. It could be Roman numerals I, II, III. Others use a sort of grading reference A, B, C, D. Some list the revenue category or market value of the account. Again, this field can be customized as you see fit. When selecting from this drop-down list, you will only be allowed to choose one of the selections.

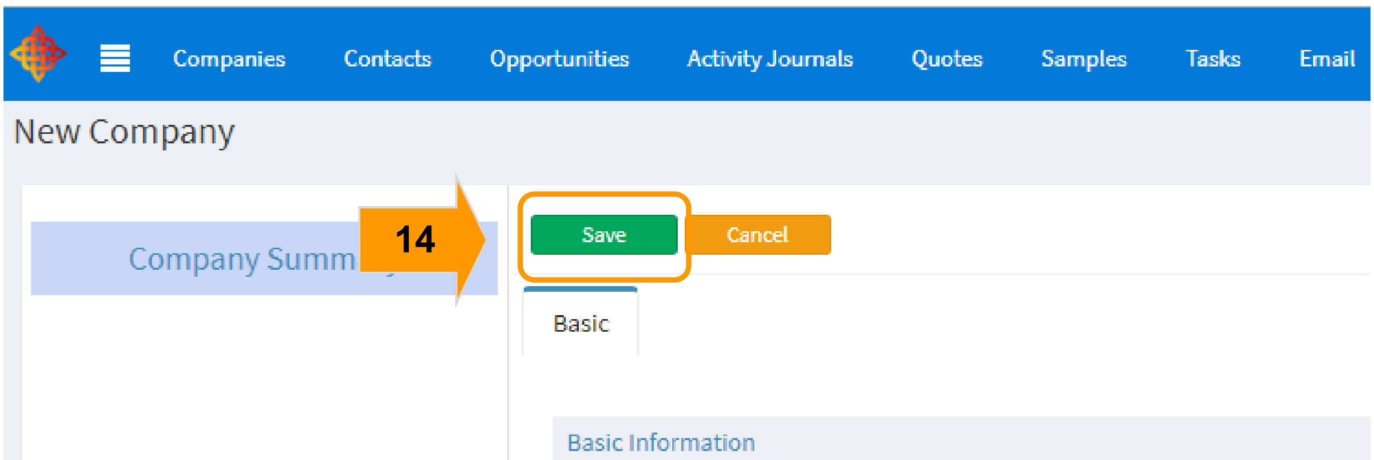
12. Left click drop-down and select “Product Potential .”

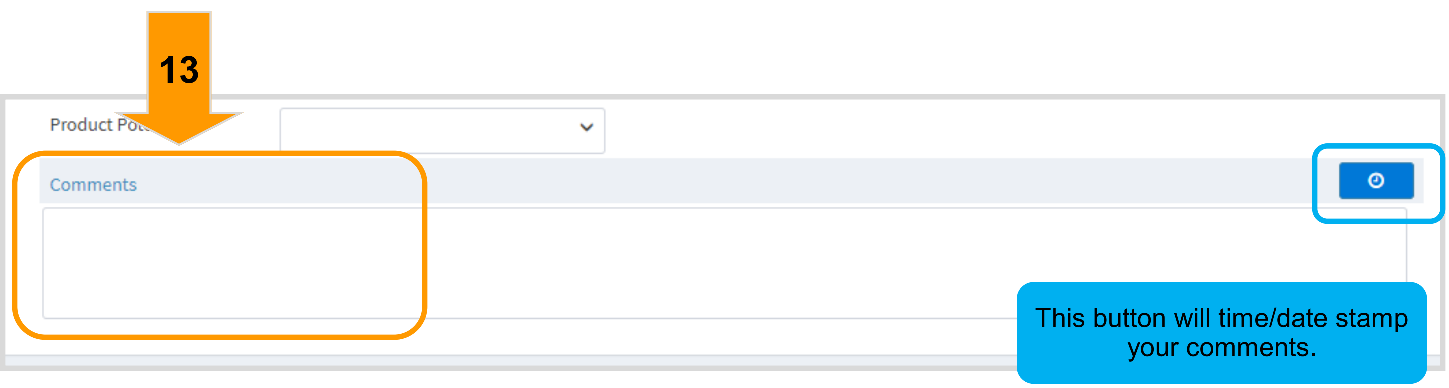


Company: Product Potential
Think of your list of manufacturers (or better yet, the product families each of them offer). Adding those product groupings to the product potential sub-table then lets you identify which customers are a potential for buying X, Y, or Z. So when the manufacturer calls and says, “I’d like to do a ride along and demonstration our new fangled X” you can easily pull a target list to call and set appointments with. Pick customers or distributors with product potential X in the call pattern of _____. Within a minute your list is ready to go. No more hunting, pecking, guessing or leaving a key account behind. When selecting from this drop-down list, you will be allowed to choose multiple selections.

13. Enter any comments. *Optional*
14. Left click “Save.”

This image shows the “Comments” field and "Save” button.





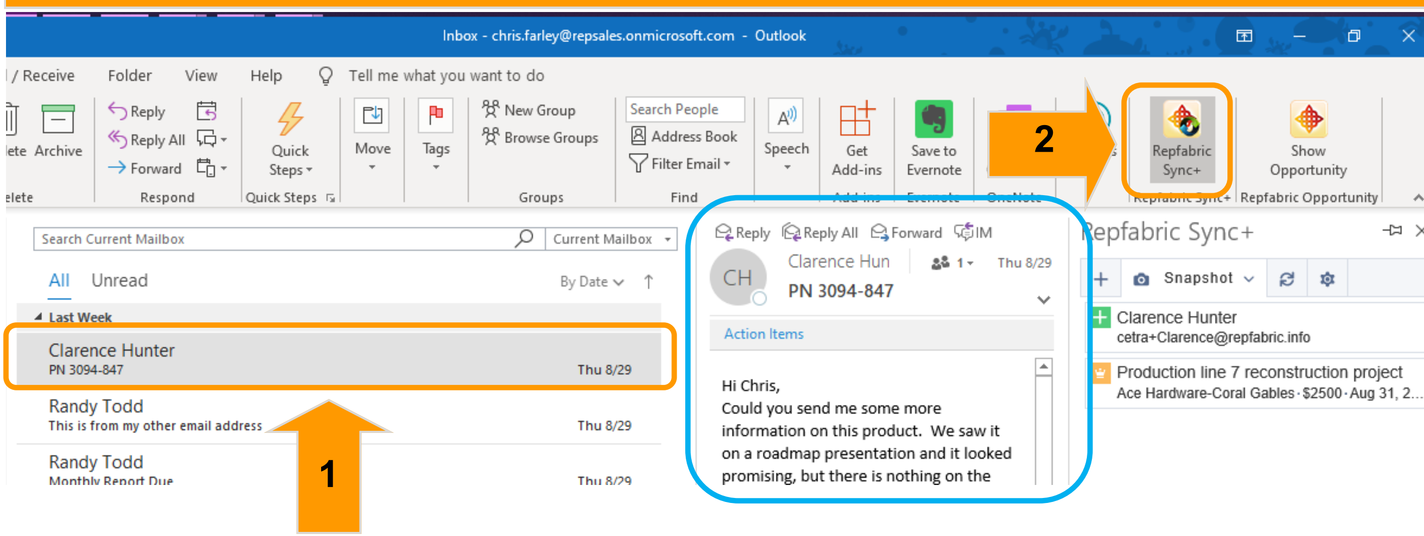
This concludes the instructions for this section.

How to Create a New Company in Outlook

You will create new customers to log opportunities and activity journal entries. You should turn the "reading pane" on, to make it quicker to access Sync+.

1. Left click on desired e-mail (If you are not using the reading pane, you will need to double left click to open the e-mail).
2. Left click "Repfabric Sync+" button.
3. Left click "+."
4. Left click "New Company."

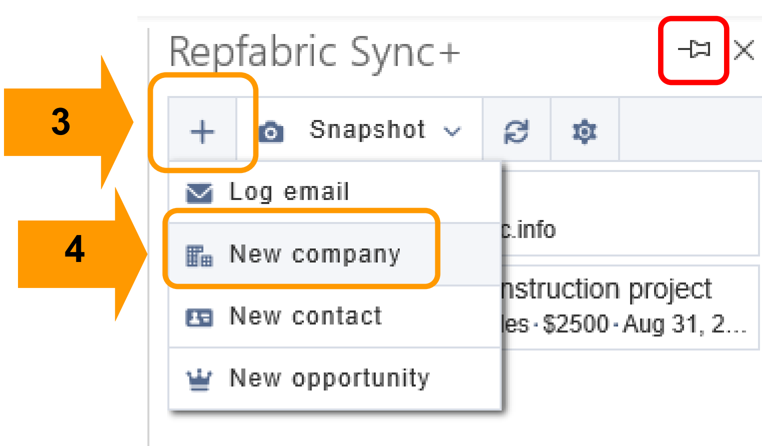
This image shows a selected e-mail in the sample Inbox. You have the be able to see the body of the mail either in a reading pane or have the email opened in it's own window.
In this example, the e-mail is being viewed in the reading pane on the right (outlined in blue).



Start with an e-mail relevant to the opportunity you want to create.

Based on names in the To, Cc, Bcc fields, Repfabric may auto select the customer and/or principal.

This image shows the + and the options for creating new items.

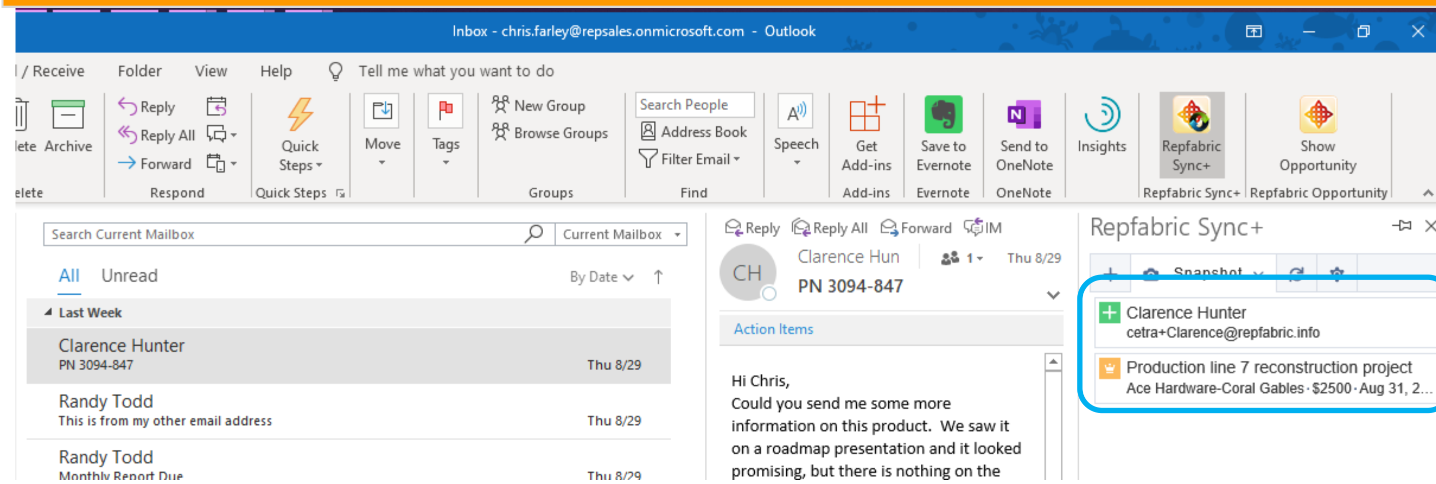


Left click the thumbtack to "pin" the Sync+ window open.

5. Left click + sign.
6. Left click “New Company.”
7. Type the company name (use the TAB key to advance to next field).

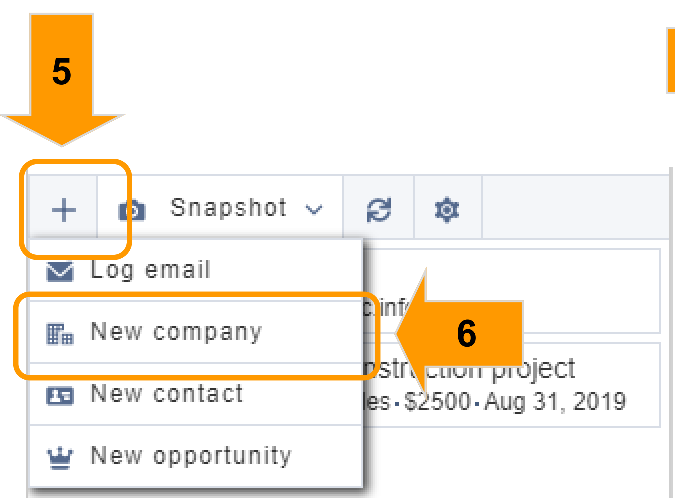
All contacts and opportunities associated with this principal are shown in the Sync+ pane.

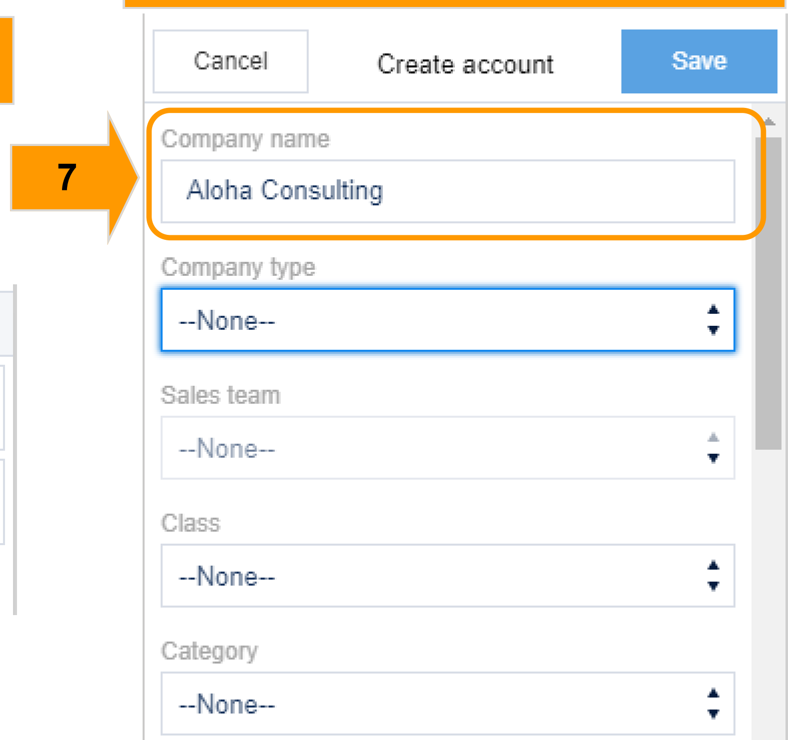
Purple = a contact that is in Repfabric. Green=a contact this is not in repfabric. Yellow= an opportunity assigned to this contact.



This image shows the “Company” field.

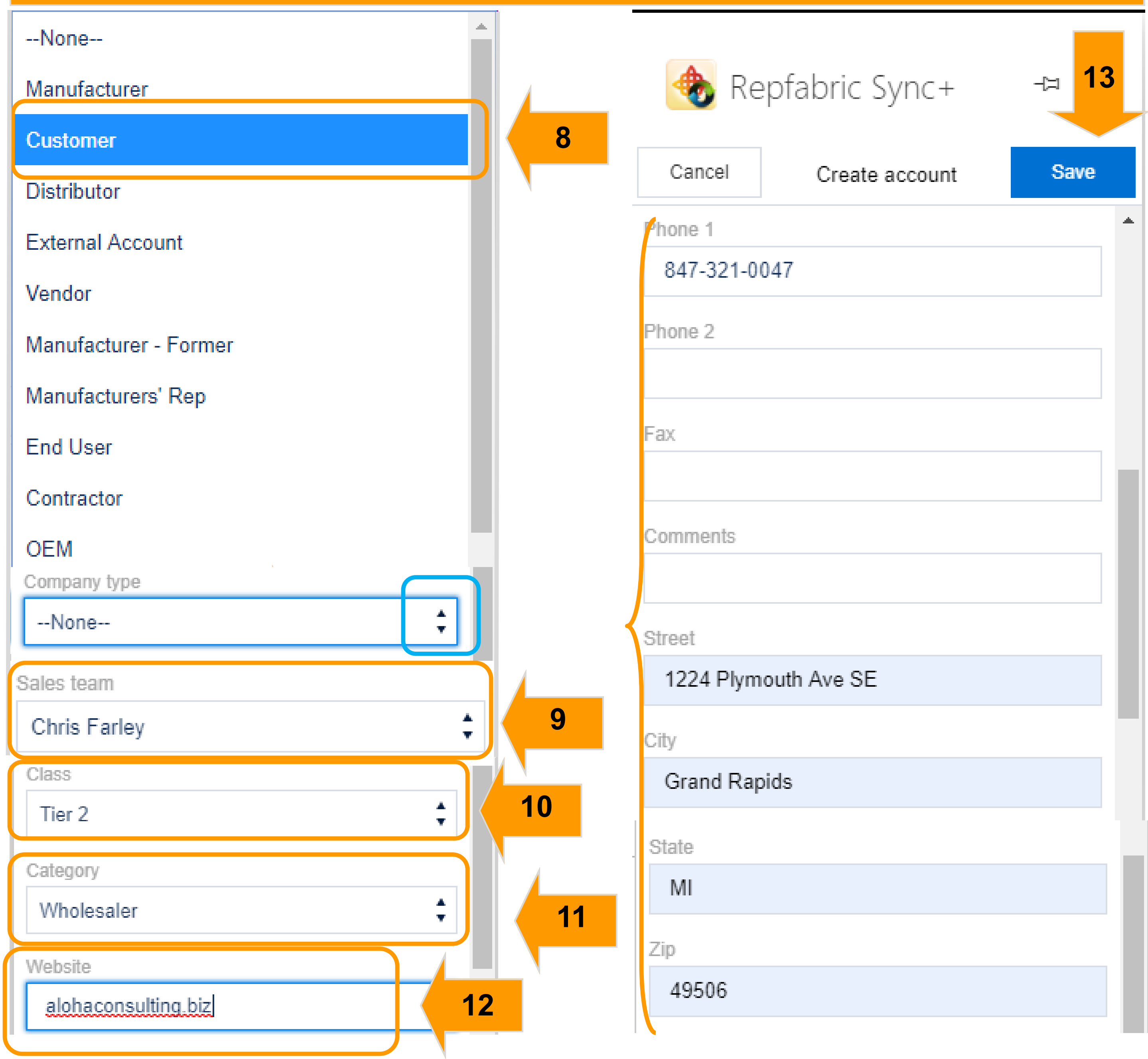
This image shows where to find the “Add” button and “New Opportunity.”





8. Left click "Company Type" and select desired type *(For an explanation of "company types", see page 18).*
9. Your sales team will be selected by default. You can change it if you need to.
10. Left click "Class" and select desired type *(For an explanation of "company class", see page 24).*
11. Left click "Category" and select desired category.
12. Fill in the company's web address (you can leave out the "www"). This web address will link any email address with this domain to this company in Repfabric.
13. Fill in any additional fields and "Save."

These images show examples of the fields when creating a new customer.
The more fields you fill in, the more detailed information will be available in reporting.

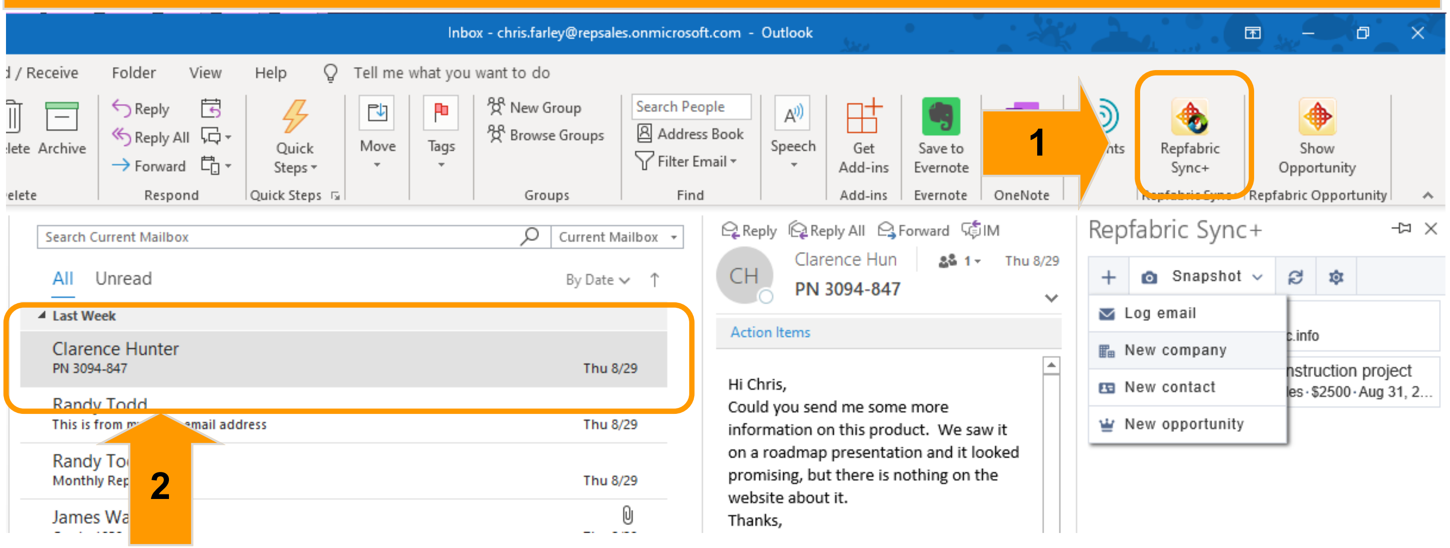


How to Create or Edit a Contact in Outlook or Gmail (Sync+)

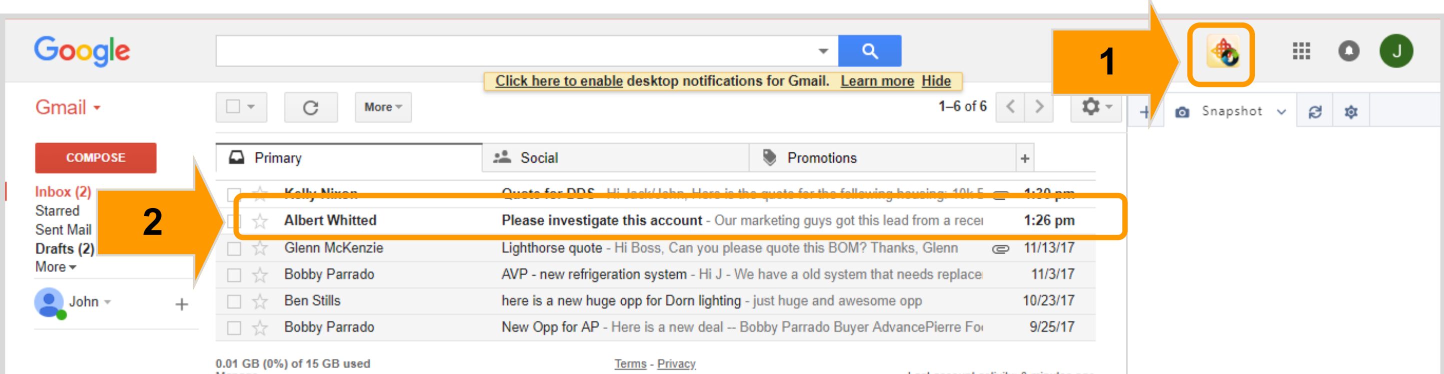
Repfabric makes the detection and addition of a new contact to the company contact list very simple by surfacing all contacts in an email that you receive, which are looked up individually to determine whether they contact exists already in Repfabric.
This tutorial shows you how to detect and if necessary, create a contact within the Sync+ add-in in your email.

1. Open the Sync+ connector within Outlook.
2. Left click desired email.

This image shows how to navigate to the Sync+ Sync tab in **Outlook** Desktop



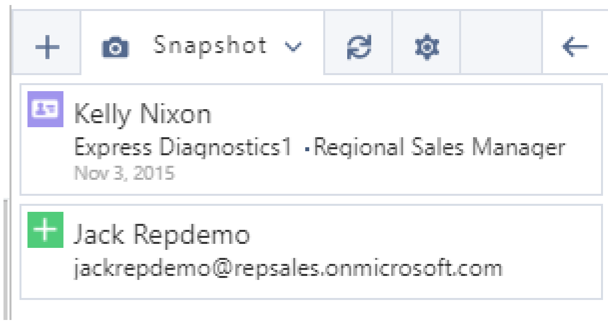
This image shows a selected e-mail in the sample Inbox in **Gmail**. Left click to open.



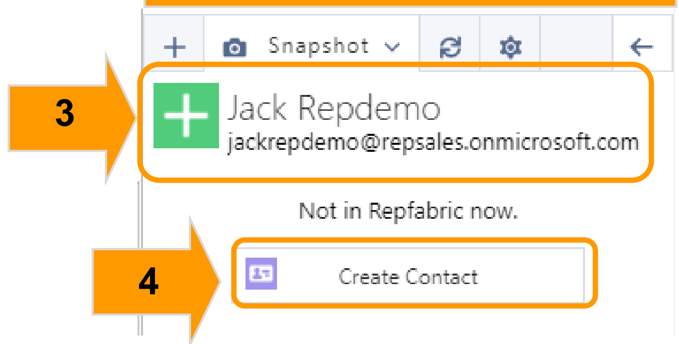
Repfabric will automatically detect the contacts associated with the email.

⇒ **Purple contacts** already exist in Repfabric.
⇒ **Green contacts** require addition to Repfabric

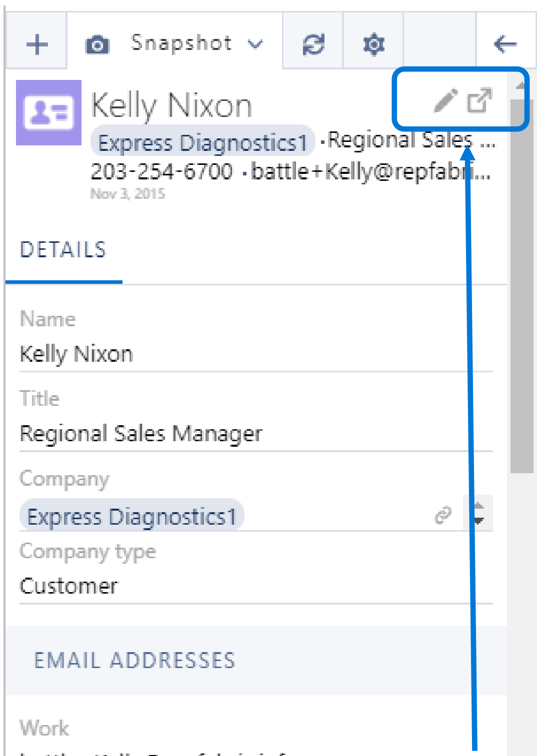
3. Left click the row of the contact you want to inspect (“Kelly Nixon” or “add Jack Repdemo”).
4. Left Click “Create Contact”
5. Fill out key Contact information
6. Search for the existing company or create it new (search runs upon typing the first 3 letters).
7. Left click “Save”



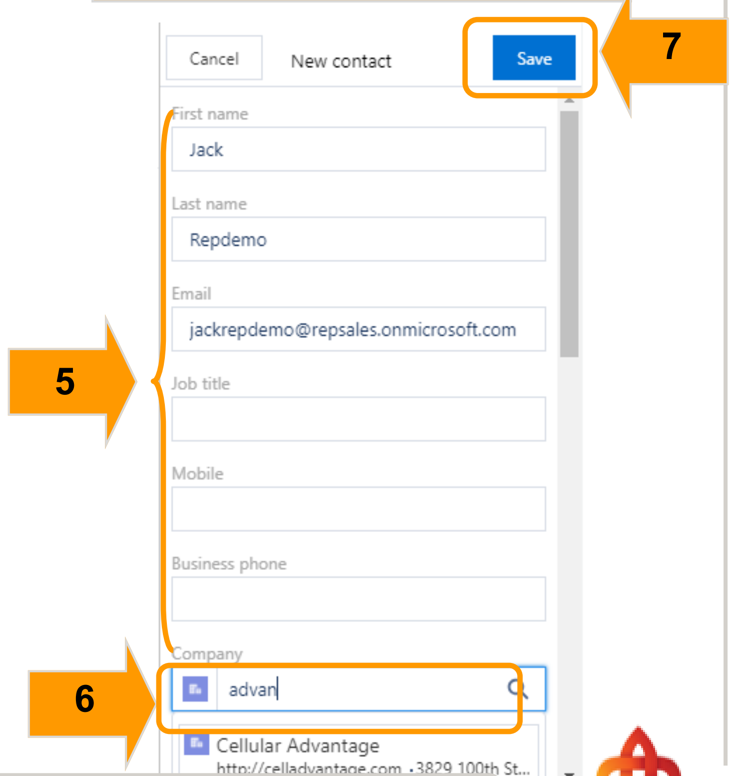
This image shows a view of the contact NOT in Repfabric



This image shows a view of the Kelly Nixon, a contact already in Repfabric



This image shows the contact create screen



Use the pencil icon to edit this contact.

Use the pop-out icon to jump into Repfabric to see all emails sent to this contact.

This concludes the instructions for this section.

How to Enable Contact and Calendar Sync in Outlook or Gmail

During the initial installation of the Repfabric Sync+ add-in or Chrome Extension, 2 way contact and calendar synchronization remains turned off in order for you to cleanse any contacts you do not want to sync to Repfabric.
Depending on your server configuration, contact synchronization can create companies and contacts or simply link to contacts where the company already exists. There are many factors that influence whether an email contact will match to an existing contact in Repfabric.

WARNING: Before enabling your sync, you **MUST mark personal contacts** as "Private" or assign them a "Personal" category in Outlook. In GMAIL, you must assign them to a "Personal" contact group. Please see the related tutorials for instructions on how to do this task.

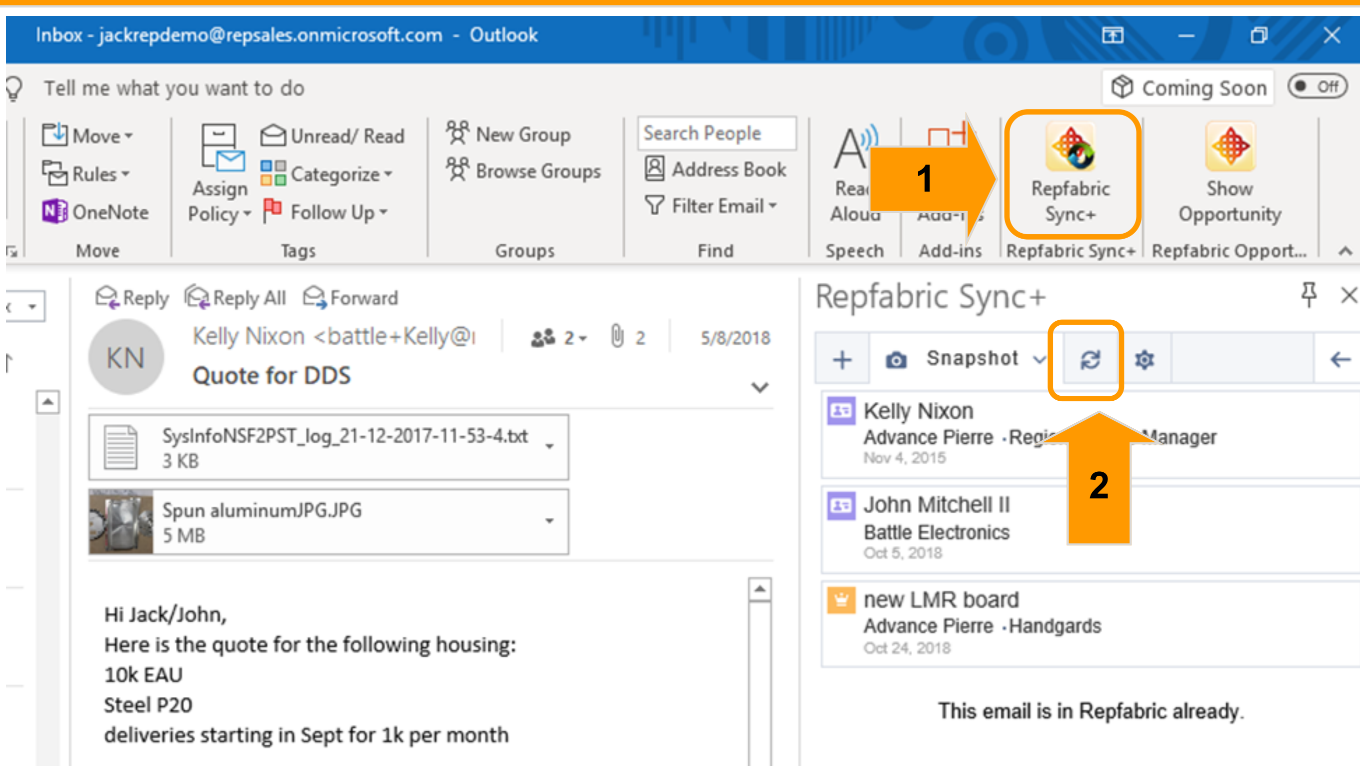
This tutorials **ASSUMES** you have completed the privatization task and you are now ready to enable the 2 way sync.

NOTE: Once enabled, the sync engine automatically runs every 20-30 minutes whether you have Outlook or Gmail open or not. You do not need to push "Sync Now", which causes an immediate contact sync request. Also note, this sync process is for contacts and calendar only. Email sync is accomplished with an entirely separate mechanism.

If you have questions, please contact support@repfabric.com to review your contacts prior to sync to avoid any duplicate companies and contacts from being created by mistake if you have never sync'd before.

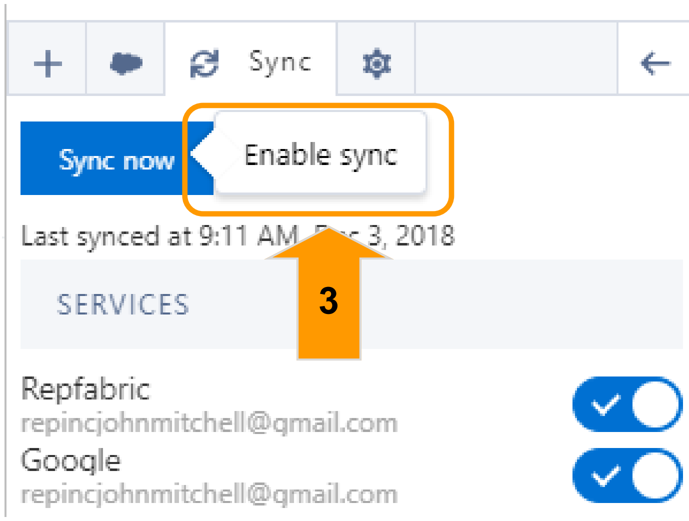
1. Open the Sync+ connector within Outlook
2. Left click the "Sync" icon

This image shows how to navigate to the Sync+ Sync tab



3. Left click "Enable Sync."

This image shows the Synchronization tab



Depending on the number of contacts you have and the number of contacts on the server, the first time sync can take several hours as each field for every contact is considered and matched to or enriched by the link with Repfabric.

At the completion of the sync, there will often be contacts that are unable to be sync'd for a variety of reasons related to data quality.
To resolve these issues, please see the **Tutorial—How to Resolve Contacts that do not Sync.**

This concludes the instructions for this section.

How to Use Map Filters to find nearby Companies

When you are out on the road or talking to an end user, it is often helpful to find nearby distributors that carry one of your lines in order to point the end user to a place where he can purchase the parts.

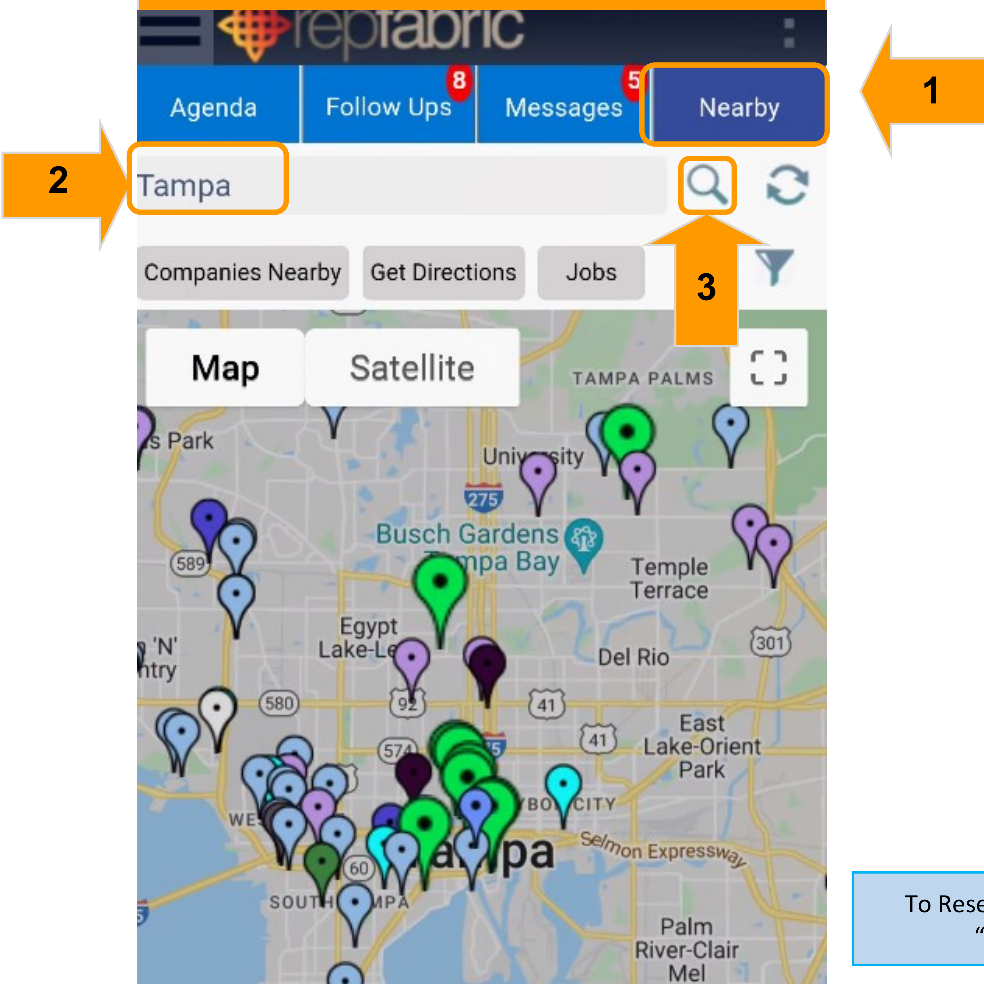
Another example is when you have manufacturer riding along with you, and you have an appointment cancel. You can use the map and characteristics of nearby companies to reroute to another company to make that time productive.

Reorienting the map to another location

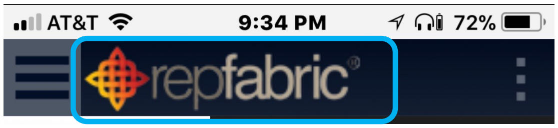
By default the map on the "Nearby" tab will show your current location. To change the location of the map.

1. Tap the "Nearby" tab.
2. Type in the location you plan to visit. This can be a city, an address or intersection.
3. Tap the magnifier to search.

This image shows how to reorient the map.



To Reset your view, tap the logo to reach "Home." screen at any time.



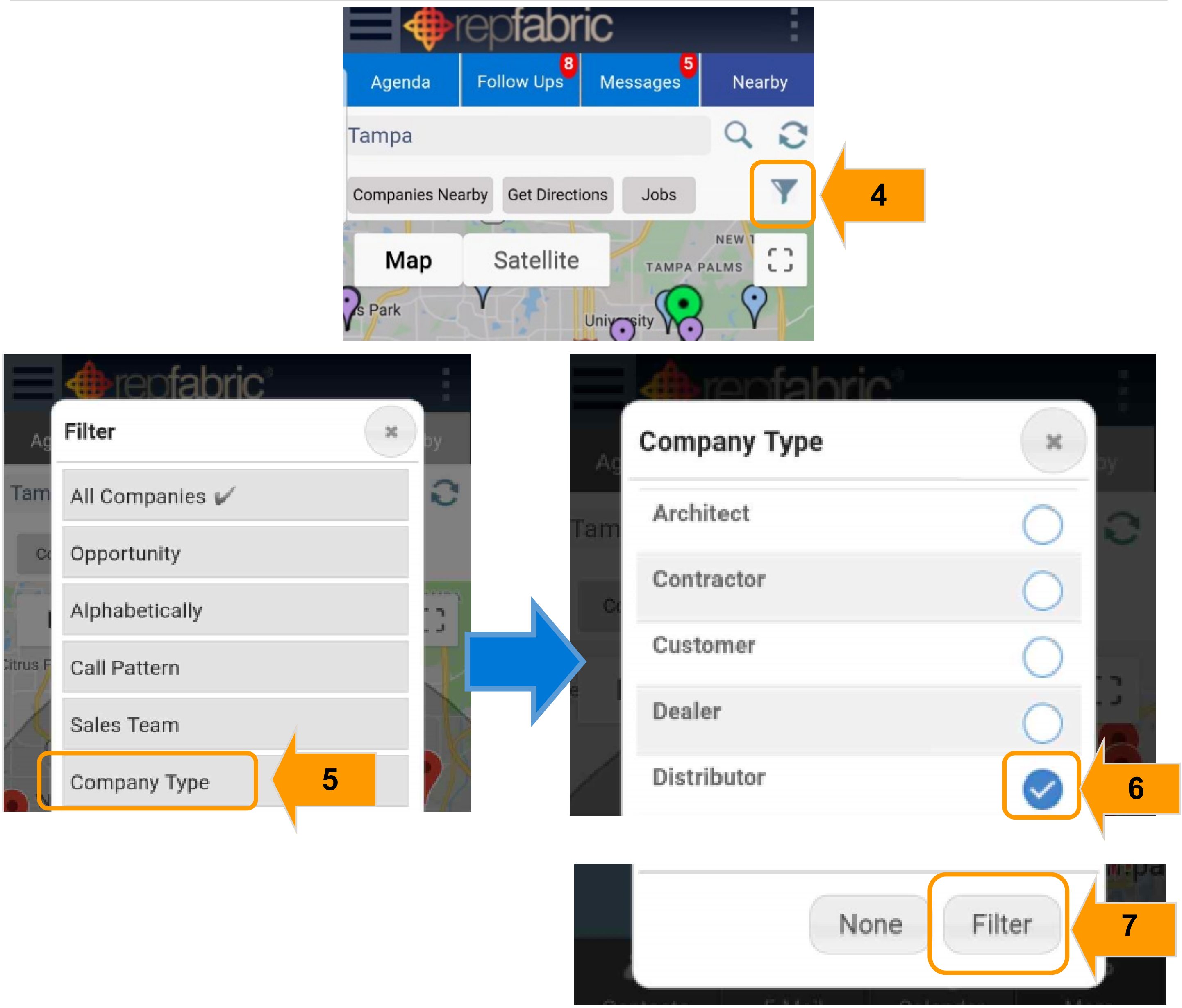
Using filters to show pins of only companies you want to view

By default, all locations of companies in Repfabric will be shown. You can declutter the pins by filtering for certain characteristics.

4. Tap the “Filter” button.
5. Tap “Company Type.”
6. Tap “Distributor.” The pins shown are now only that of companies that are “Distributors.”
7. Tap “Filter” button.

Repeat the filtering process to create “combination filters” such as “All distributors that carry Moen” (marked in their product potential field).

These images show how to filter.



This concludes the instructions for this section.

How to prepare for a Sales Call from the Mobile App

You can use Repfabric to very effectively prepare for a sales call in well under 5 minutes. Repfabric will tell you:

- How to get to a company with an unfamiliar address
- Important customer company level news
- Key contacts at the account
- Open opportunities for follow up
- Prior activity at the account by line
- Sales dollar trends by line and by part number for the account

This tutorial will explain the high-level elements of "Pre-call planning" from three entry points:

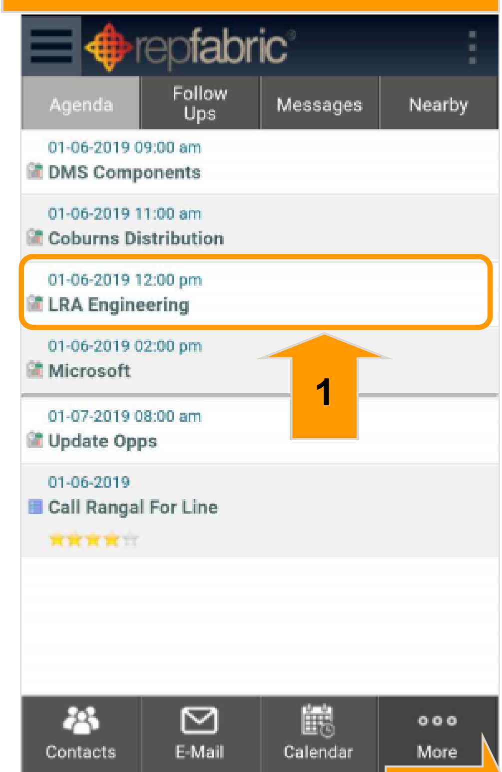
1. **A Scheduled Appointment**
2. **The Nearby Map**
3. **From a Company**

Preparing for a Scheduled Appointment

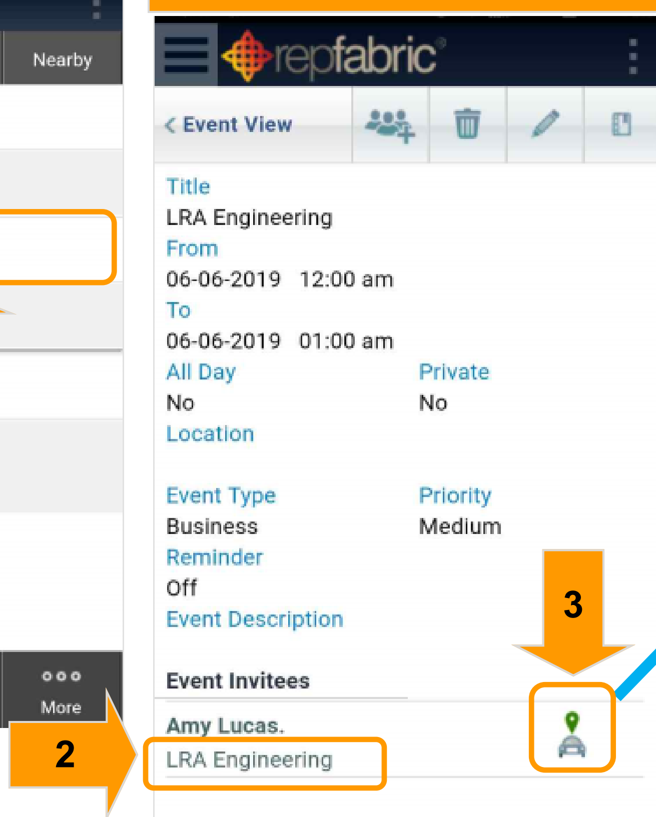
When your calendar sync is enabled, appointments you have sent and received from your email calendar (such as Gmail/Outlook calendar) will automatically be mirrored in the mobile app's calendar and show on your "Agenda" page when you launch the app. This includes attendees on the meeting invite.

1. Left click the appointment or event you want to prepare for.
2. Left click the "Company Name" below the contact to see the company details.
3. For **Driving Directions** to the contact's work location, left click the "Lightning Pin" next to the contact.

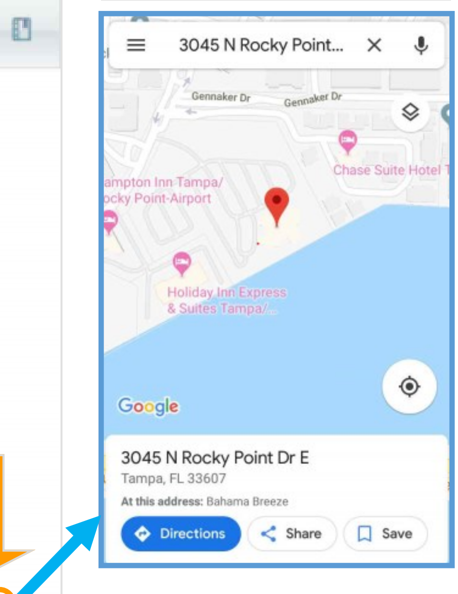
This image shows the "Events" for today in the "Agenda" tab.



This image shows the event detail screen.



This image shows the nav app.

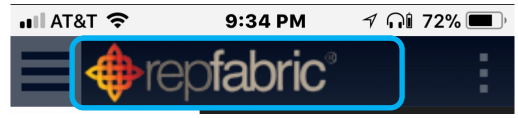


Preparing for a Drop-In Sales Call from the Nearby View

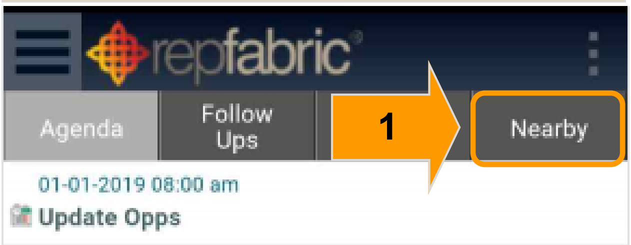
For accounts with a good physical address, the Nearby map view will allow you to view and prepare for unscheduled or non-time sensitive appointments.

1. Tap “Nearby” tab.
2. Tap on a pin to locate desired company.
3. Tap on the Company name label. This takes you into the Company Detail screen.

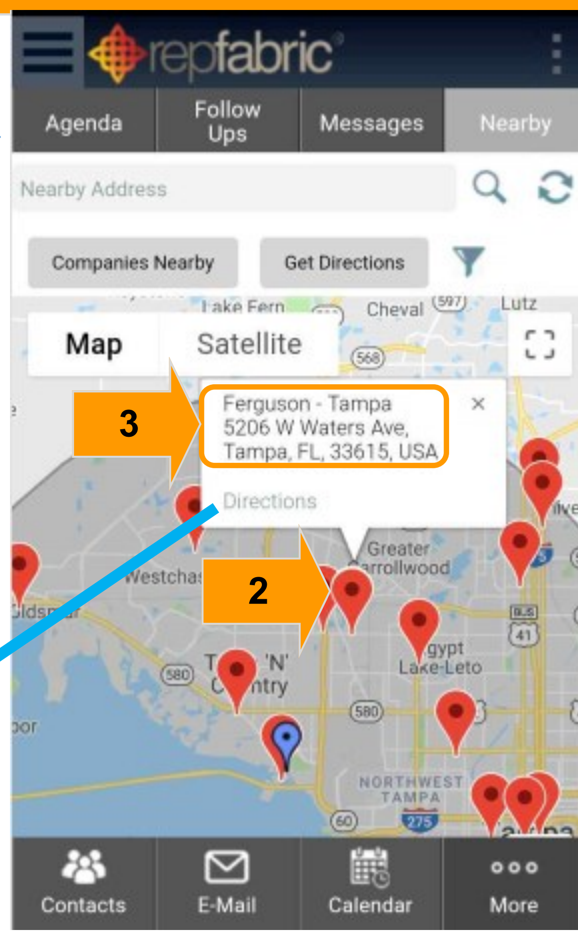
Tap the logo to reach “Home.” screen at any time.



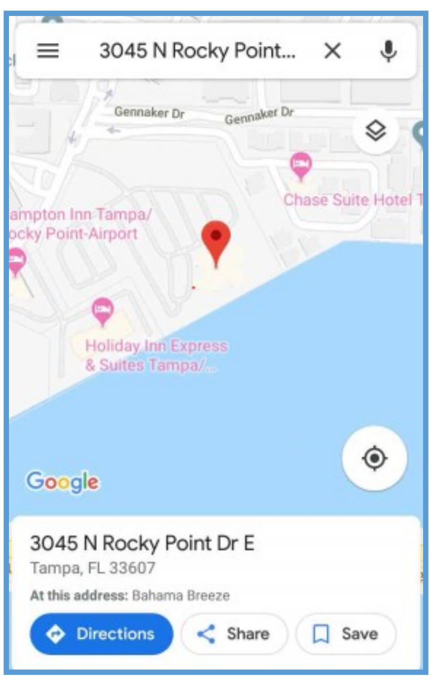
This image shows where to tap “Nearby”



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



For **Driving Directions** to the contact’s work location, left click the “Lightning Pin” next to the contact. You will be redirected to Google Navigation app which will provide directions to the account.

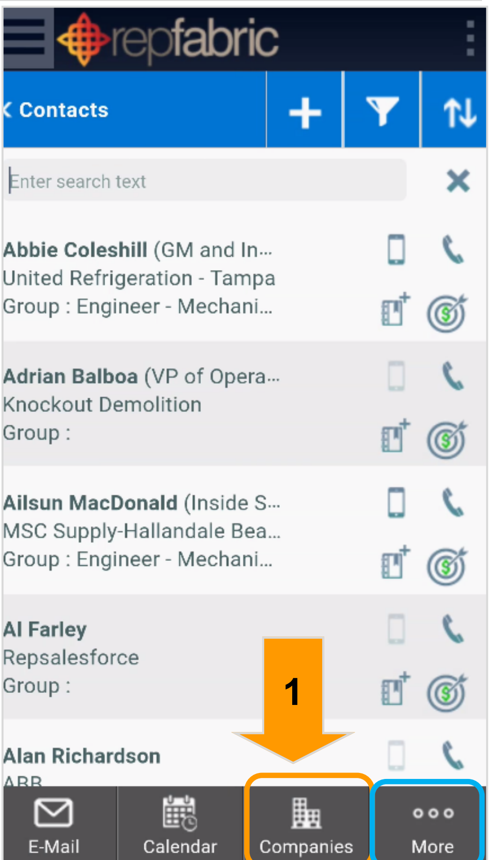


Preparing for a Sales Call from the Company List

You can also select the company from your list of companies.

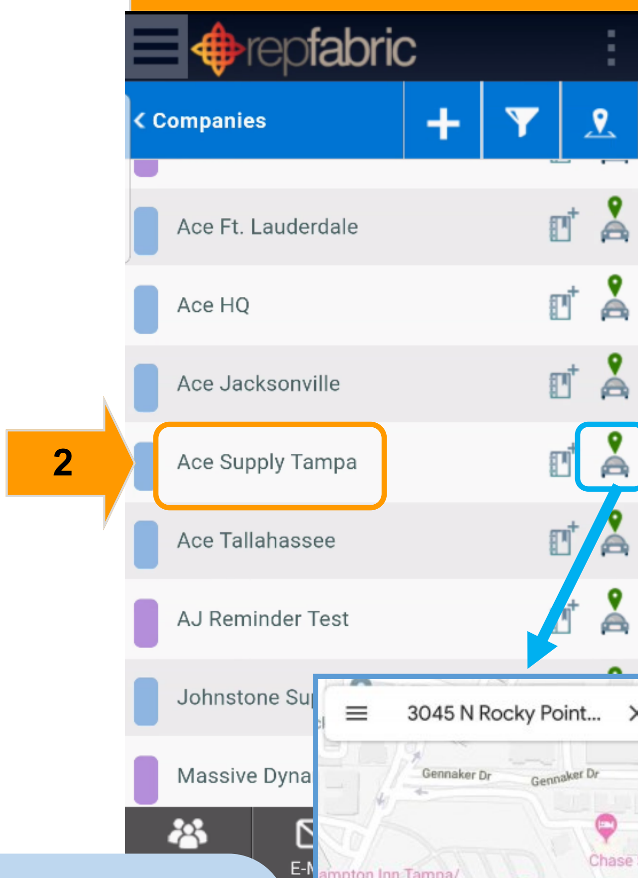
1. Tap “Companies” button.
2. Search to locate desired company.
3. Tap on the Company name. This takes you into the Company Detail screen.
4. For **Driving Directions** to the contact’s work location, left click the “Lightning Pin” next to the company. You will be redirected to Google Navigation app which will provide directions to the account.

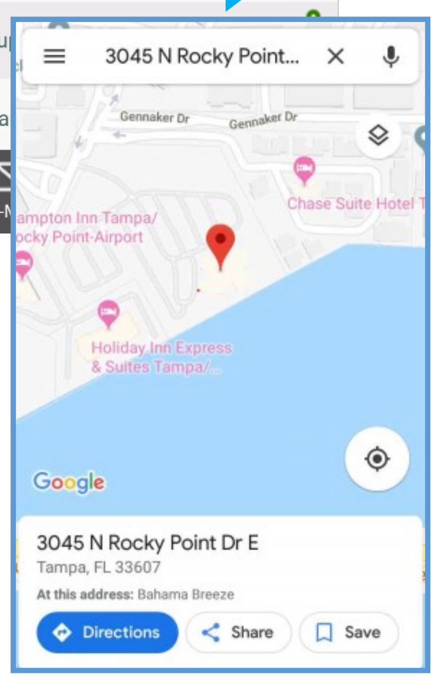
This image shows the “Companies” button.



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.

This image shows a sample list of Companies.





For **Driving Directions** to the contact’s work location, left click the “Lightning Pin” next to the company. You will be redirected to Google Navigation app which will provide directions to the account.

From the company detail view, you can review all aspects of the company you are about to call on.

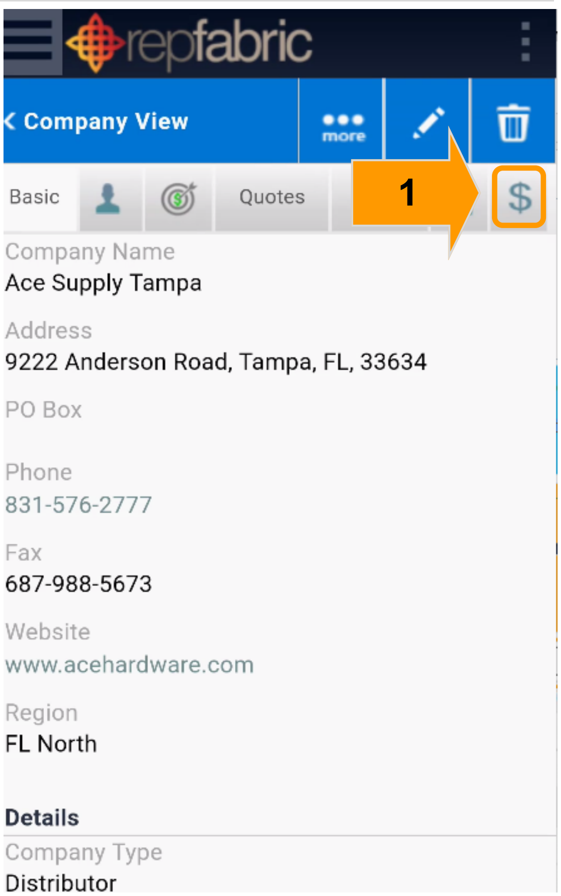
- Sales dollars by line
- Sales dollars by part number
- Customer website for recent news
- Open opportunities including quotes
- Emails within opportunities
- Emails sent to and from contacts
- Modify and edit contacts if they are no longer there
- Review key documents such as NDAs, drawings, specs and contracts
- Review prior activities
- Review prior sales calls for what lines were pitched

Review Sales Dollars for this Customer

1. Left click on the Dollar tab.
2. Left click to choose the year you want to review.

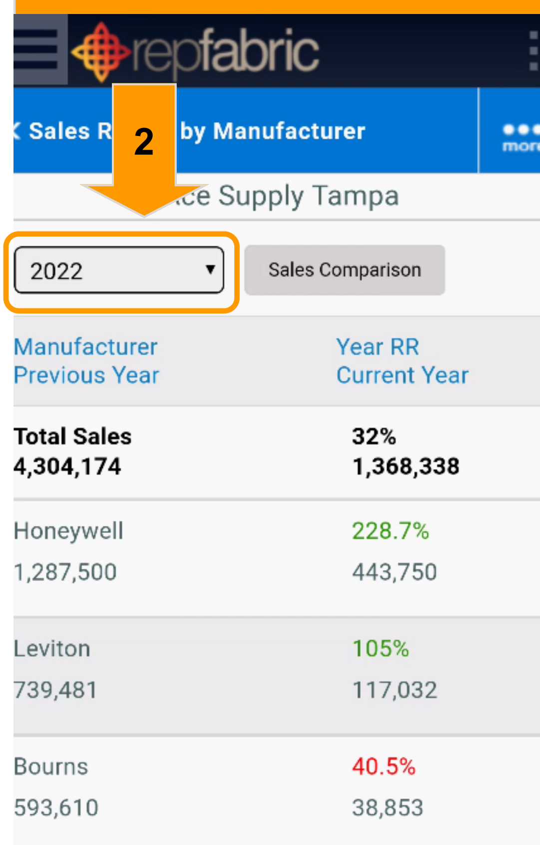
By default, the Sales by Line view will be shown for the company.
This view is explained here.

This image shows the company detail screen.



- *The current year sales are the dollars based on invoice dates.*
- By clicking on a line, you will drill into the part number level report for that line at this customer

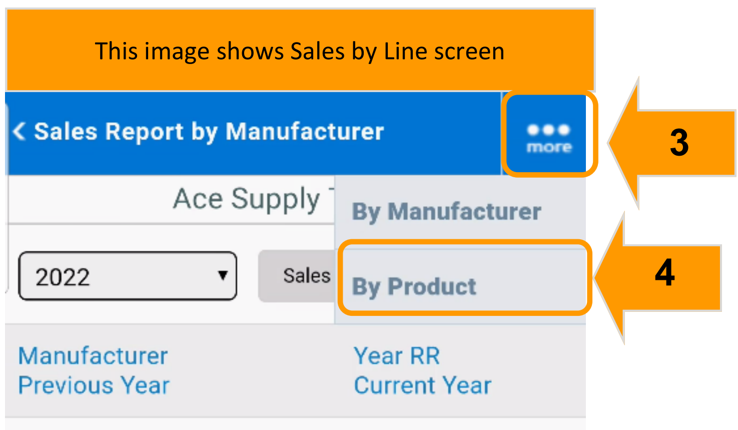
This image shows sales by line for the year based on invoices

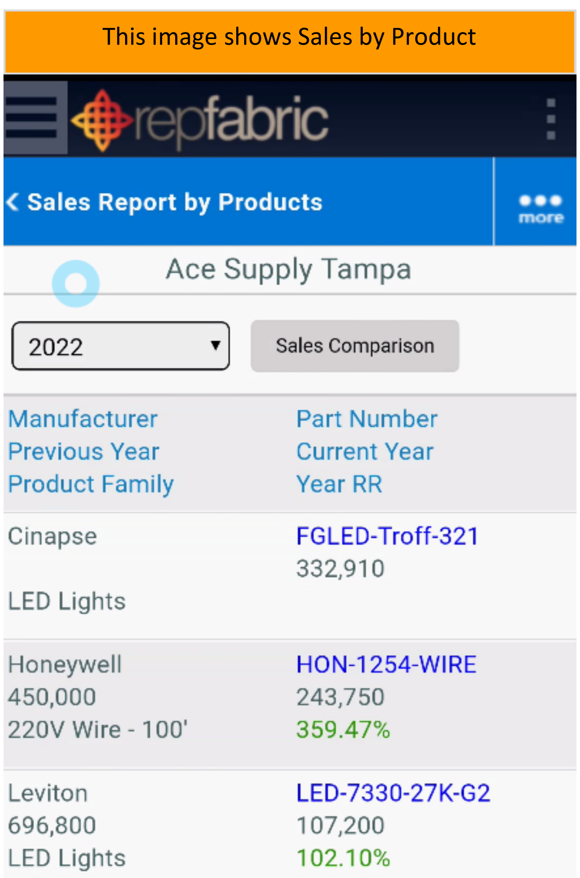


To view by part number

You can switch the view to show top part numbers or SKUs with comparisons to last year if your company loads part numbers into the sales and commissions module.

3. Left click “More” icon.
4. Left click “By Product”



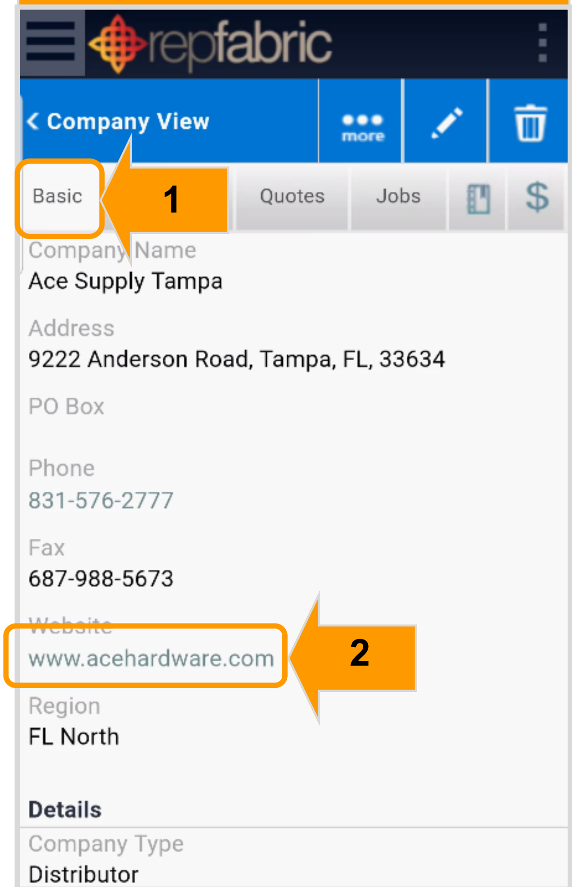


- *The current year sales are the dollars based on invoice dates.*
- Year RR means “run rate” or where you should expect sales to finish compared to last year’s sales

Review Company website information

1. Tap on the Basic tab.
2. Tap on the "Website" field.

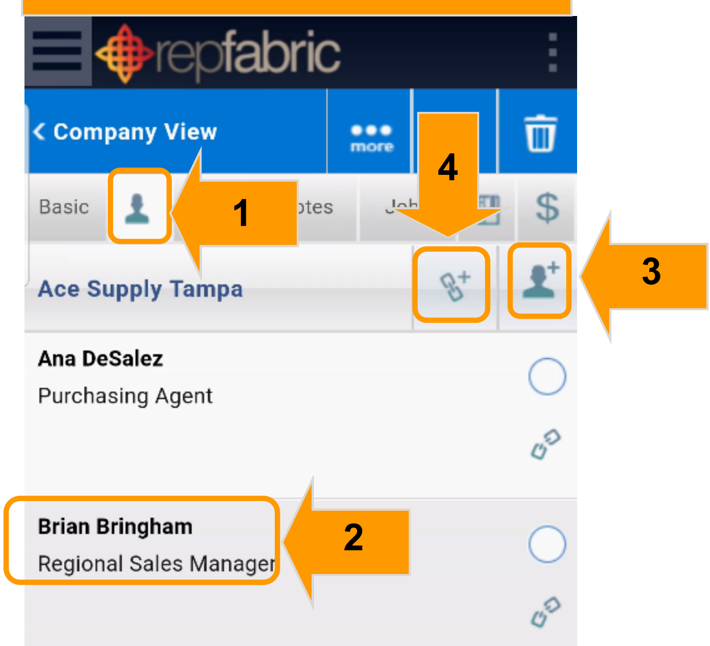
This image shows the company detail screen.



Review/ Update Contact Roster

1. Tap on the Contacts tab.
2. Tap on a contact to view more details such as opportunities and activity.

This image shows the company detail screen.



Add or link a link a contact

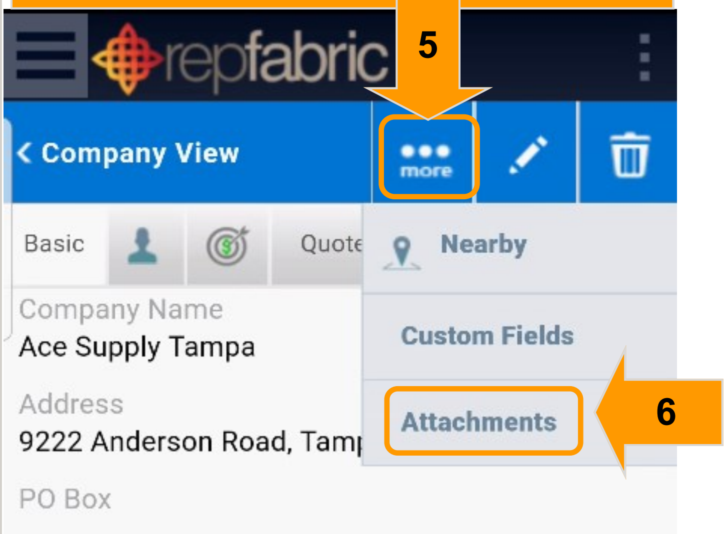
3. Tap on Contact+ icon to add a new contact at this company location
4. Tap on the link icon to select a contact from another company that now works here to move the contact to this company.

Review Important Customer Documents

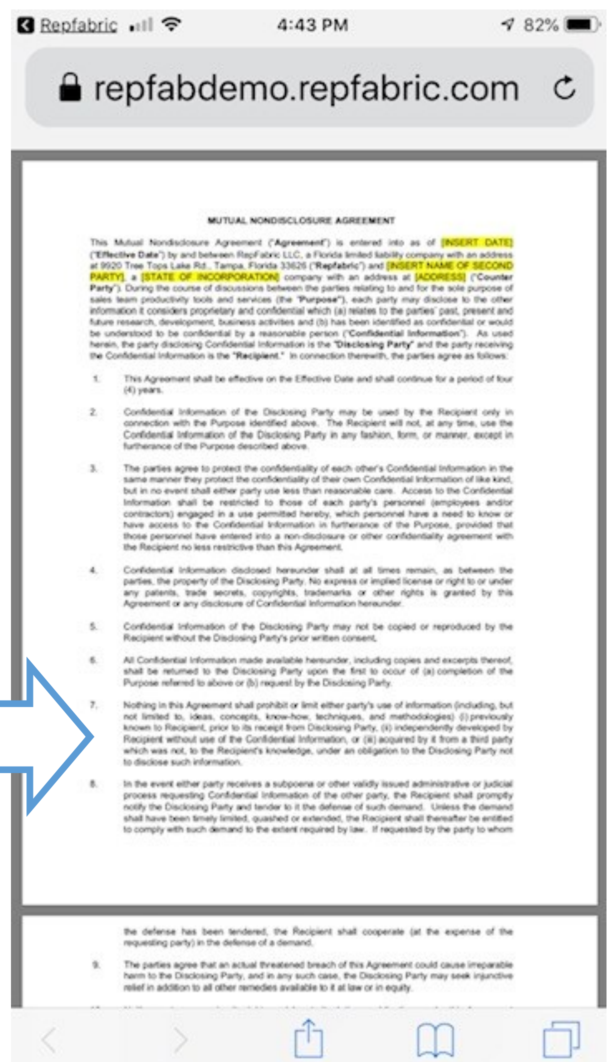
If you have uploaded key documents for the customer such as price agreements, specifications, schematics, NDAs, and pictures, they can be viewed on the attachments tab.

5. Tap on the More icon
6. Tap on the attachments menu button
7. On the attachments page, select the down arrow icon to view the file.

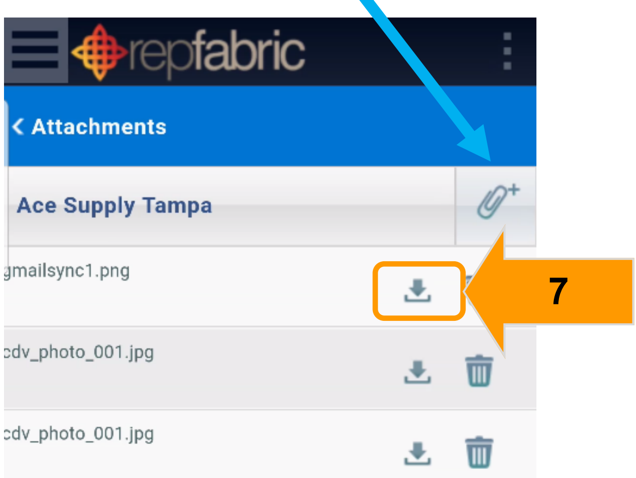
This image shows the company detail screen.



This image shows an example of a downloaded document that opened.



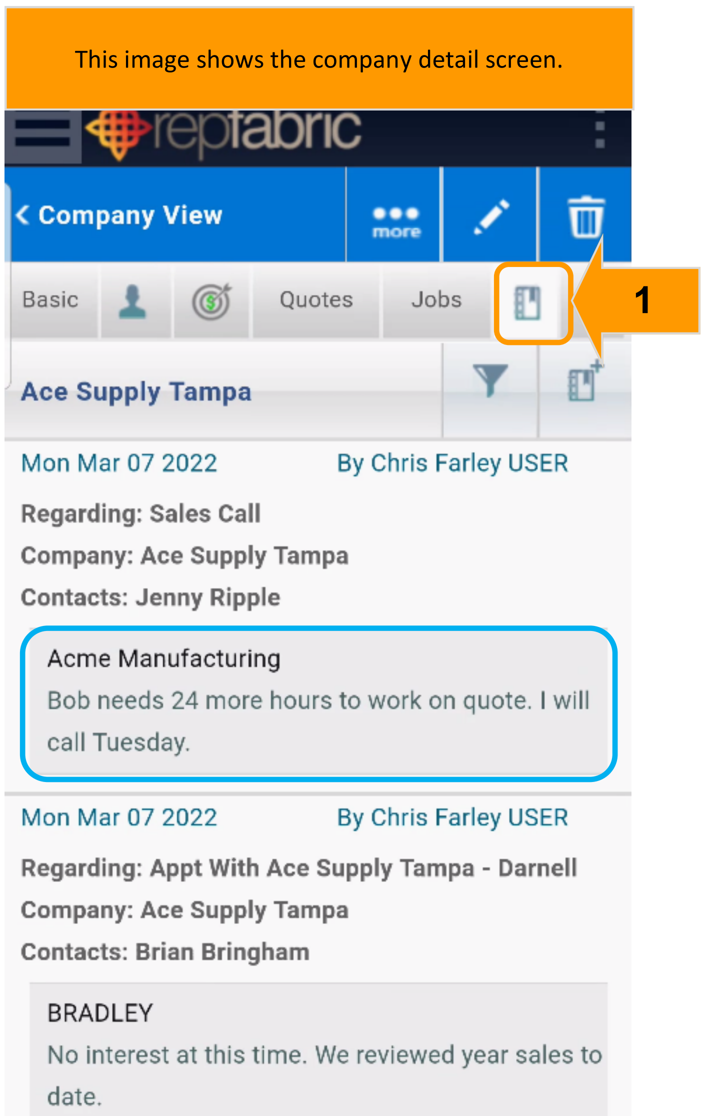
- The paperclip icon will allow you to take a picture from your phone camera or store a file from your phone under the company record.



How to Review Customer Activity in Mobile App

To see what has been happening at an account, review the activity journal tab for prior sales call notes and phone calls entered in many cases by others.

1 Tap on the Activity Journal tab

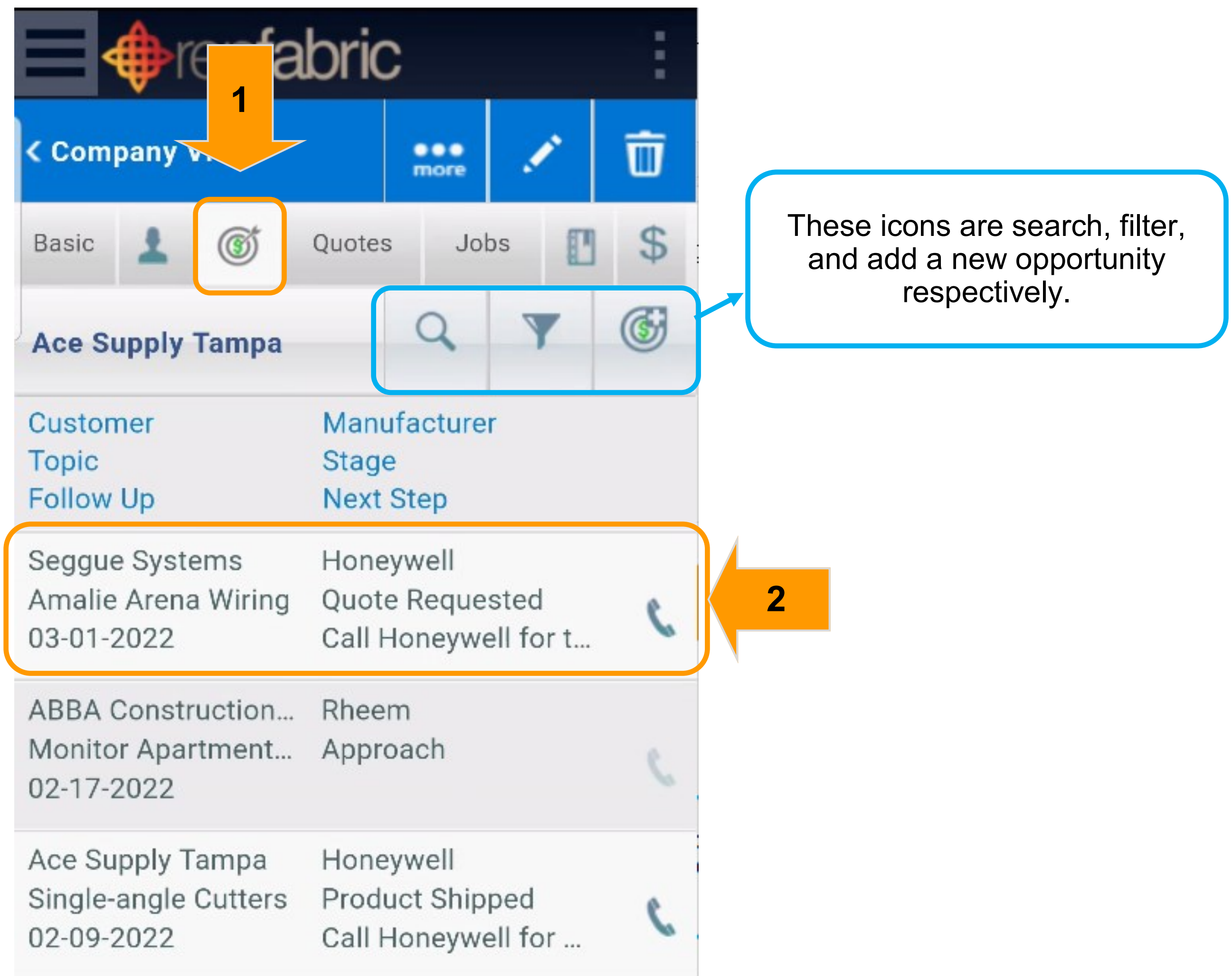


Review Open Opportunities (including Samples and Quotes)

Opportunities can be viewed for the customer, and filtered on many criteria including what stage (such as “Quoted” or “Sampled”) from the Opportunity tab.

1. Tap on the Opportunity icon.
2. Tap on the Opportunity you want to drill down into for review.

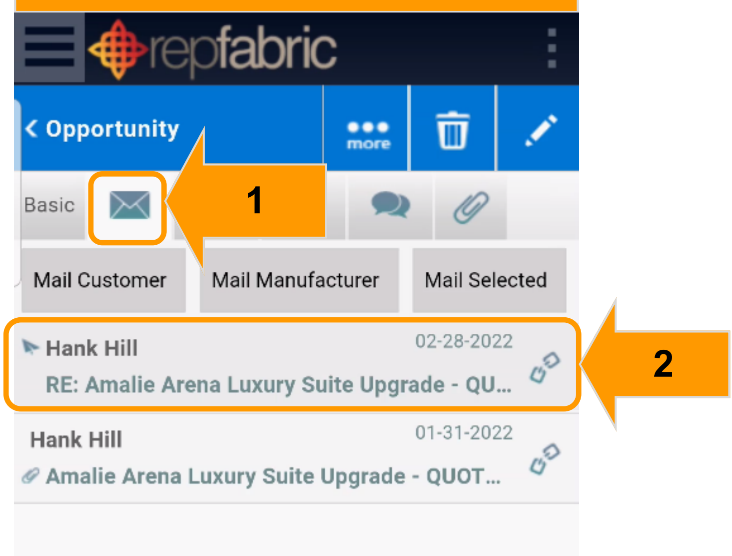
This image shows the company detail screen.



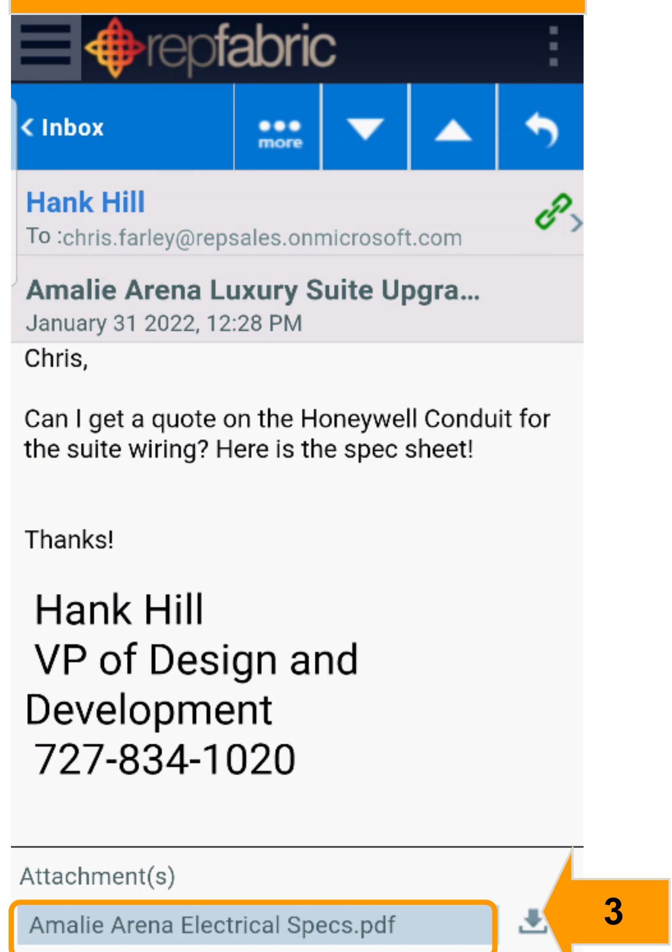
How to Review an Opportunity's Email

1. Tap on the Email tab to see the list of emails related to this opportunity.
2. Tap on an email to open its contents.
3. Tap the email attachment to download and view.

This image shows the opportunity detail screen's email tab.



This image shows the email itself.



This concludes the instructions for this section.

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

8 Places to access Activity Journal & create an entry

◊ Repfabric Web Portal

1. From “Create” button top right corner of portal. ****Fastest Access***
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 ****Fastest Access***
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 the context of the meeting. Subjects are defaulted from your email calendar event 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:

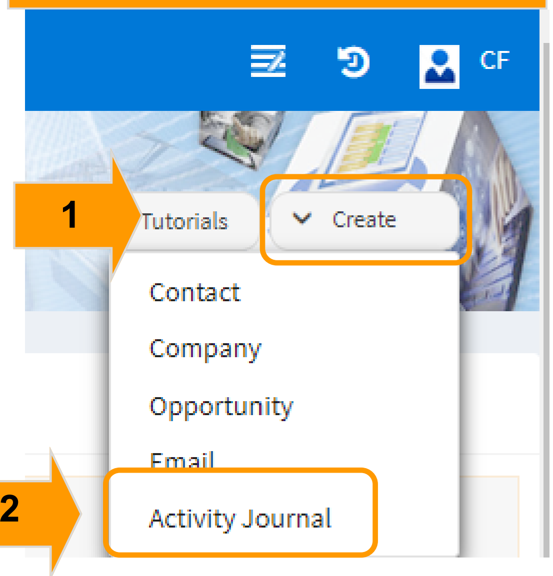
- ♦Sales call (default)
- ♦Phone call
- ♦Inbound call
- ♦Call with Manufacturer
- ♦Drop in

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 & Reminders using "Create" Button (web portal)

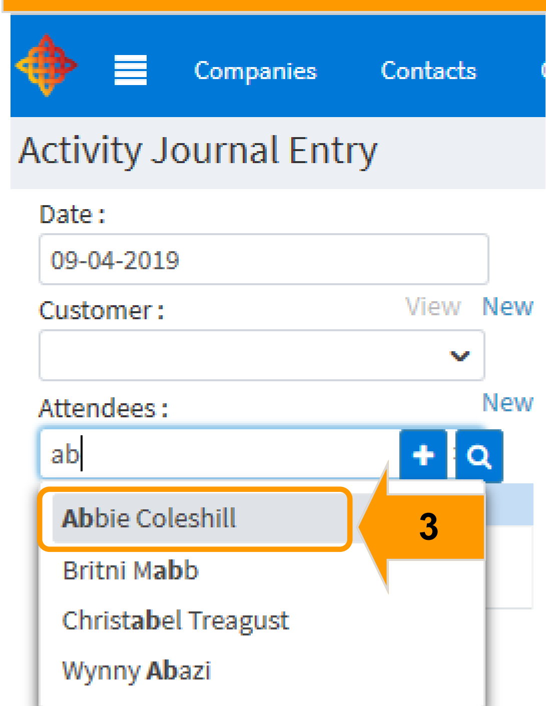
You can create an Activity Journal entry from anywhere in the Repfabric web portal. The "Create" button appears in the top right corner of every screen. You will then have to select a "Contact" and "Customer." Remember if you select the "Contact" first, the "Customer" will automatically populate.

This image shows the "Create" menu. Left click "Activity Journal."

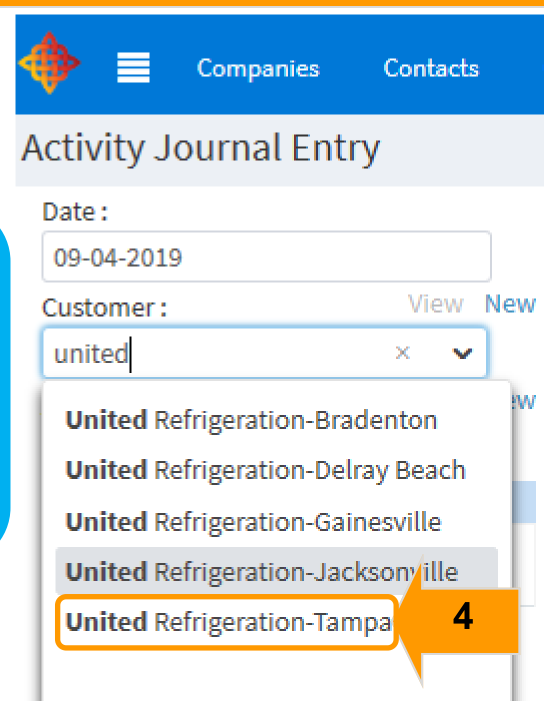


1. Left click "Create" button.
2. Left click "Activity Journal."
3. Left click drop-down and select a "Contact."
4. Left click drop-down and select a Customer" (if you do not know a contact's name, then select a customer).

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



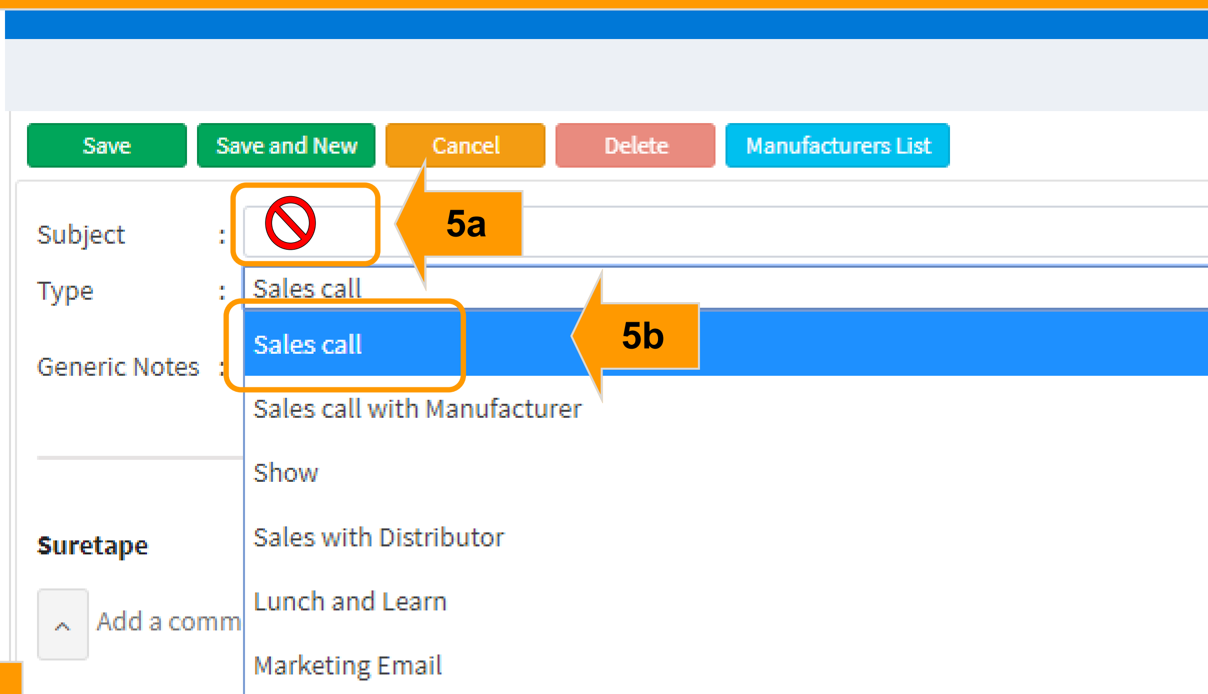
If you fill in the Contact field first, the Customer field will automatically populate.



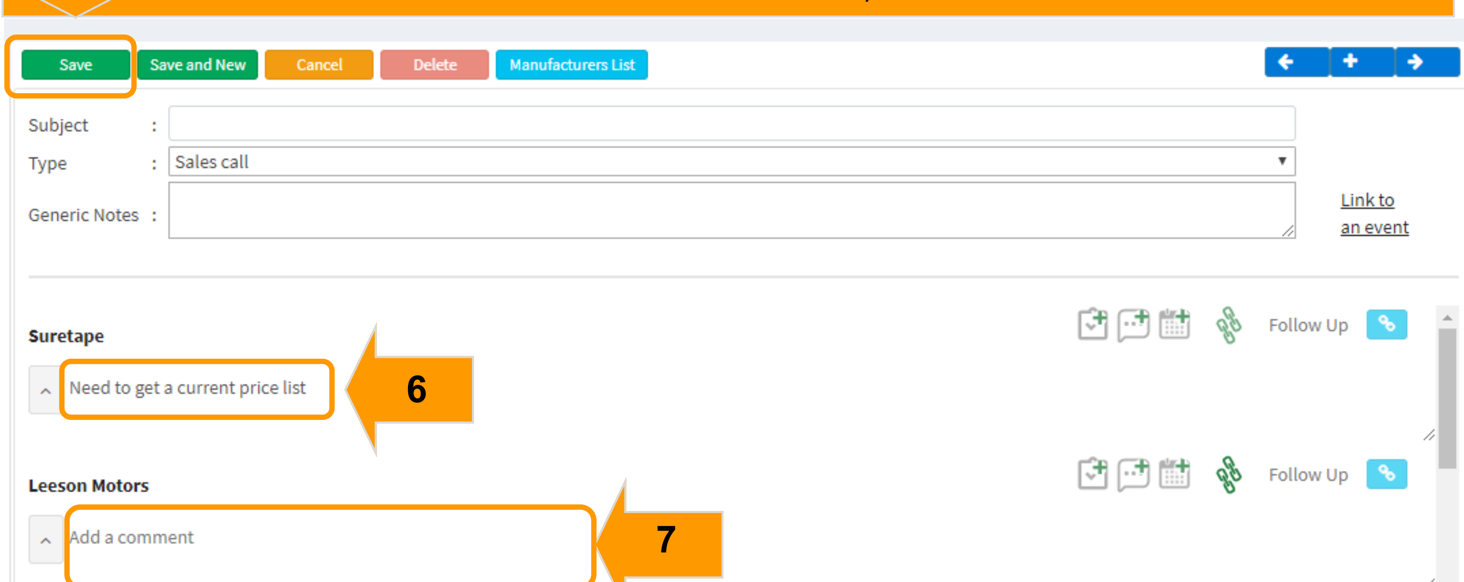
5. a) Leave “Subject” blank as it will auto-fill after you select “Type” and save
5. b) Select “Type” by left clicking the drop-down arrow over on the right. The default call type is sales call. These can be edited by our administrator under Sub-Tables.
6. Add comments to a manufacturer.
7. Add comments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



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



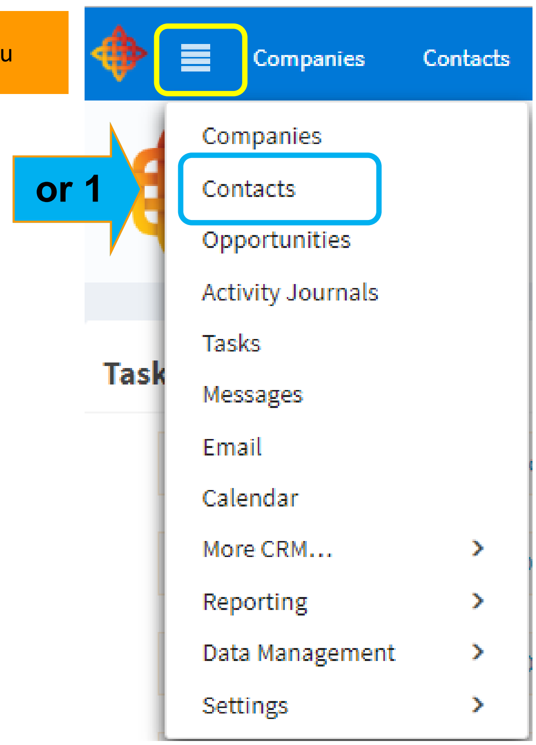
This concludes the instructions for this section.

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

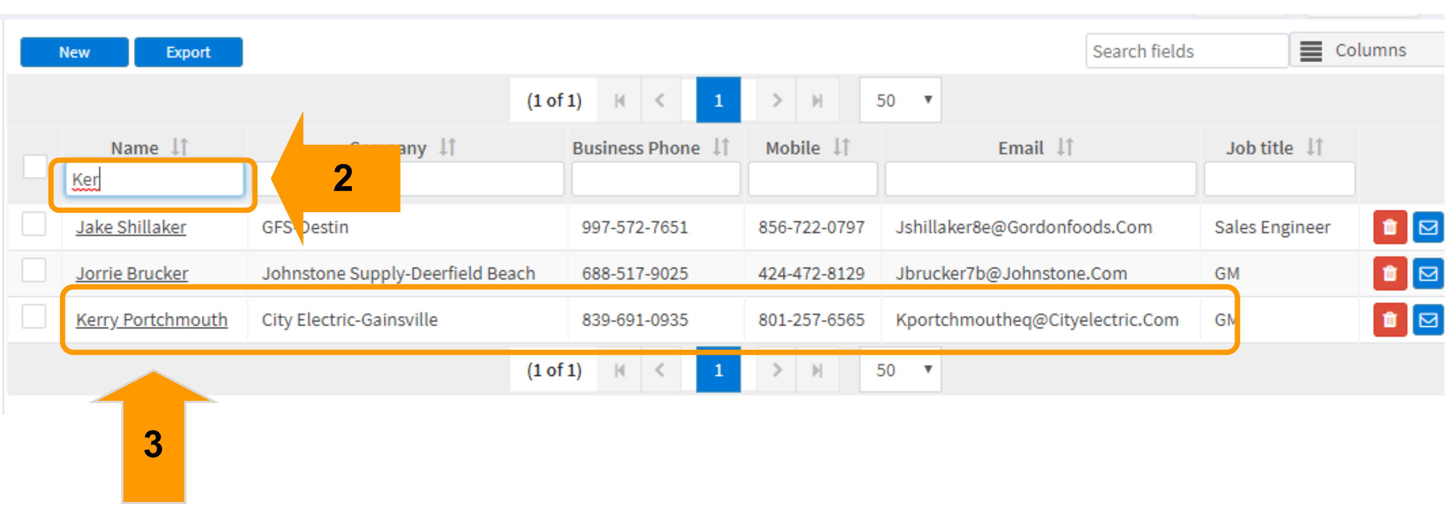
The advantage to entering Activity Journal entry in a Contact is that the Customer (aka Company) will automatically populate.

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

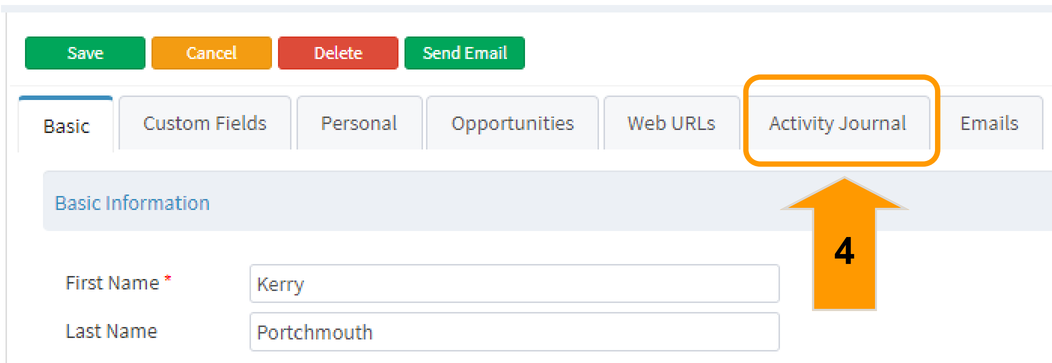


This image shows where to search for a contact.

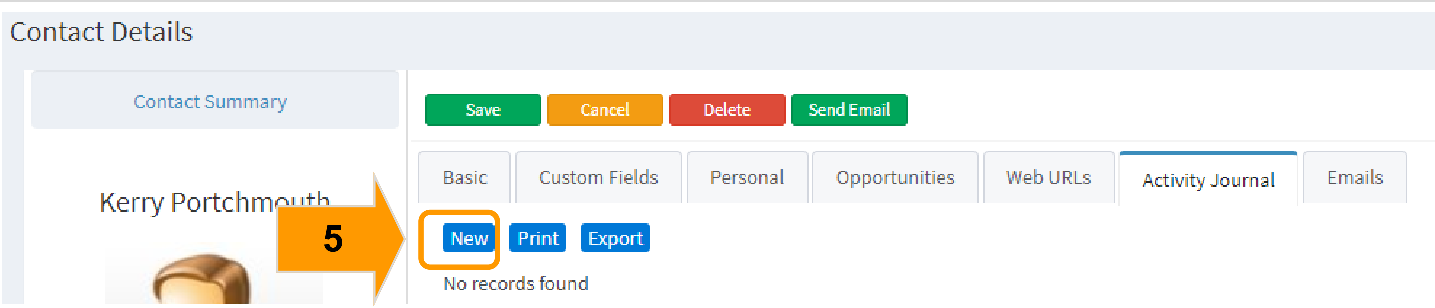


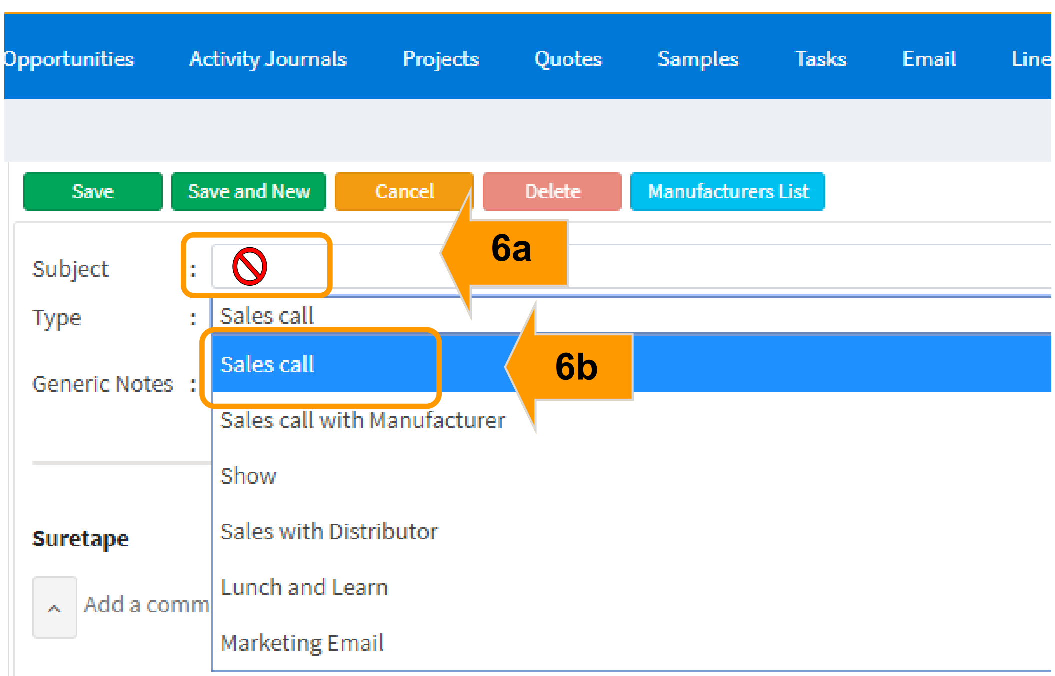
4. Left click “Activity Journal” tab.
5. Left click “New.”
6. a) Leave “Subject” blank as it will auto-fill after you select “Type” and save
6. b) Select “Type” by left clicking the drop-down arrow over on the right. The default call type is sales call. These can be edited by our administrator under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

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



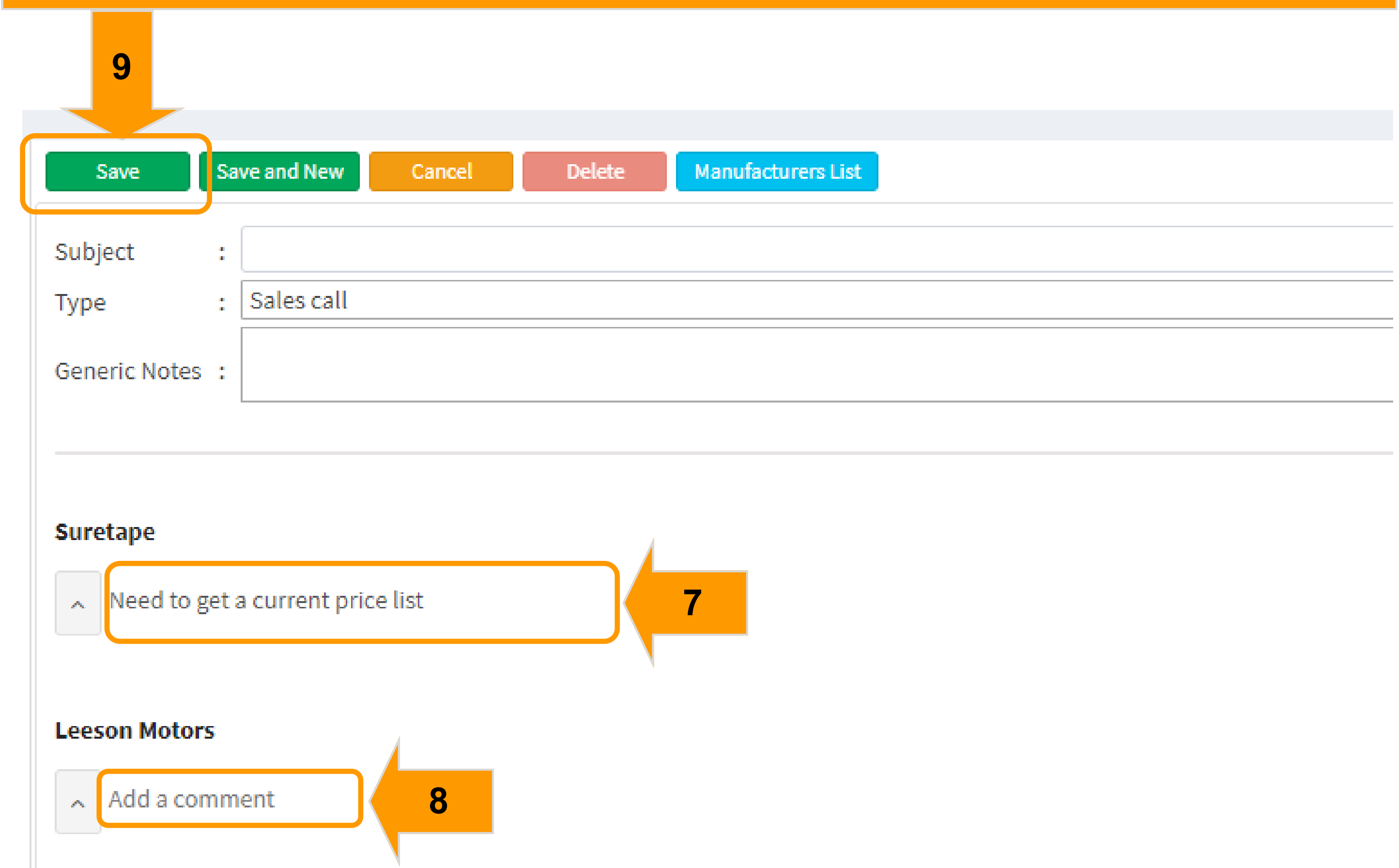
These images show the “New” button, “Subject” and “Type.”





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

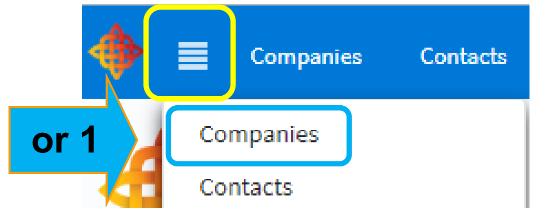
This image shows how to enter details and comments on an Activity Journal.
You can enter a comment under any of the manufacturers.



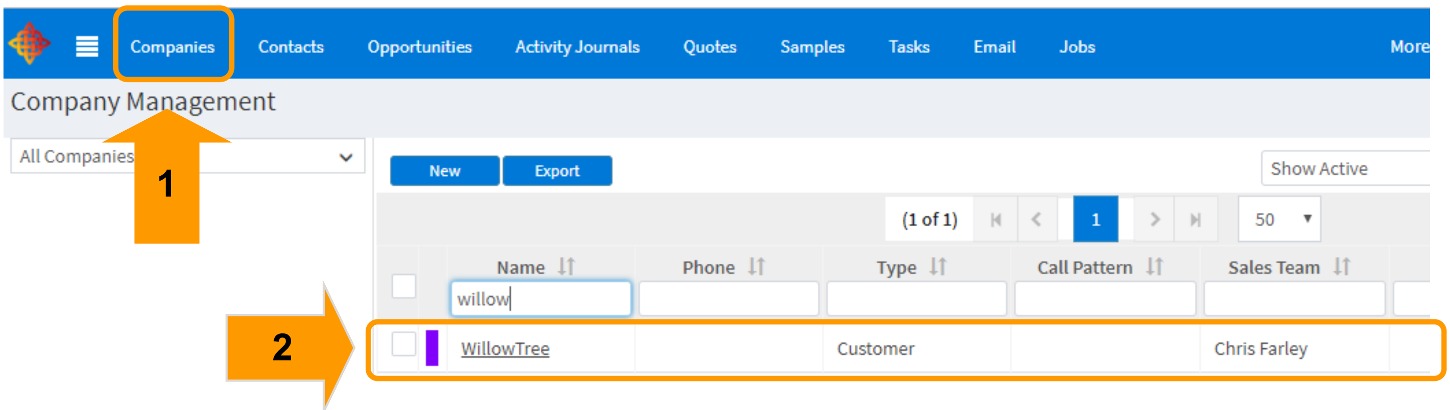
This concludes the instructions for this section.

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

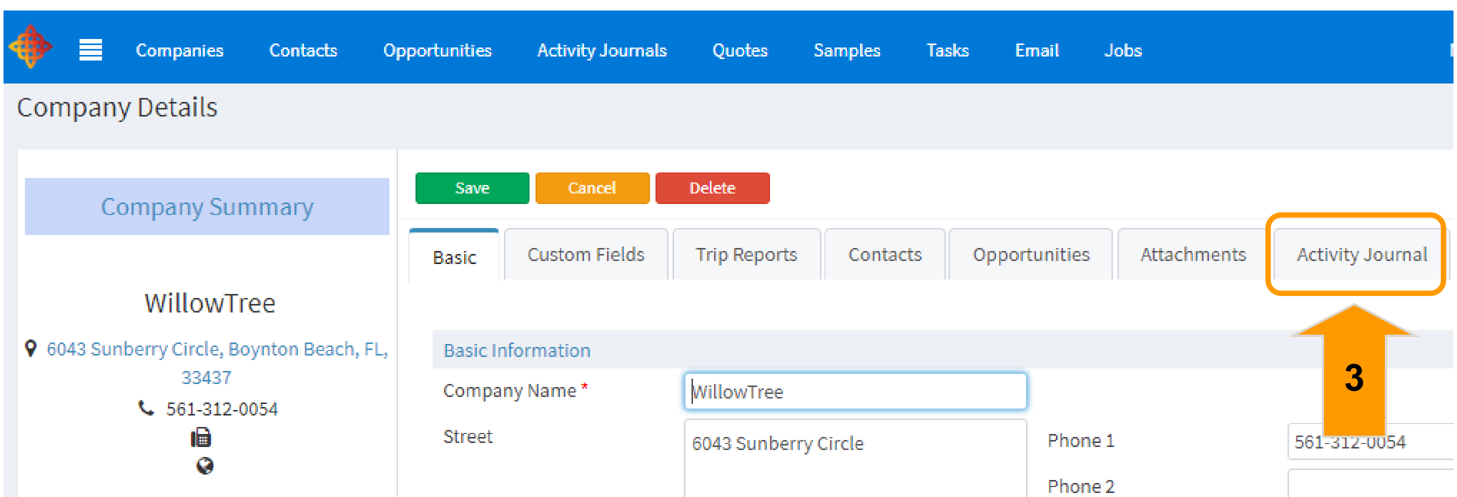
1. Left click “Companies.”
2. Left click desired Company.
3. Left click “Activity Journal” tab.
4. Left click “New” button.



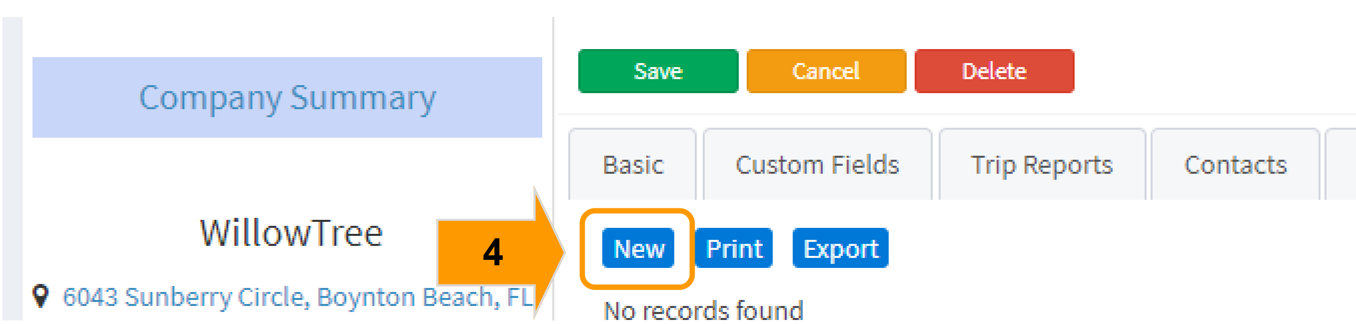
This image shows where to find “Companies” and how to search for a specific company name.



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

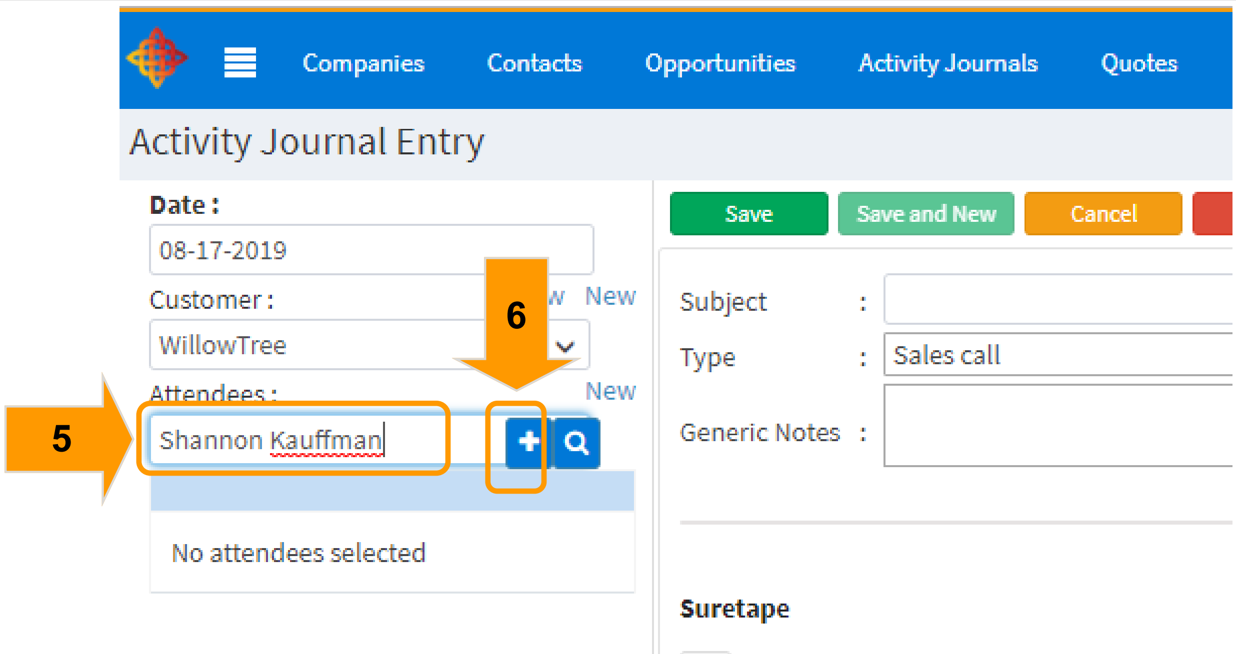


This image shows there are no activity journals for this company yet.

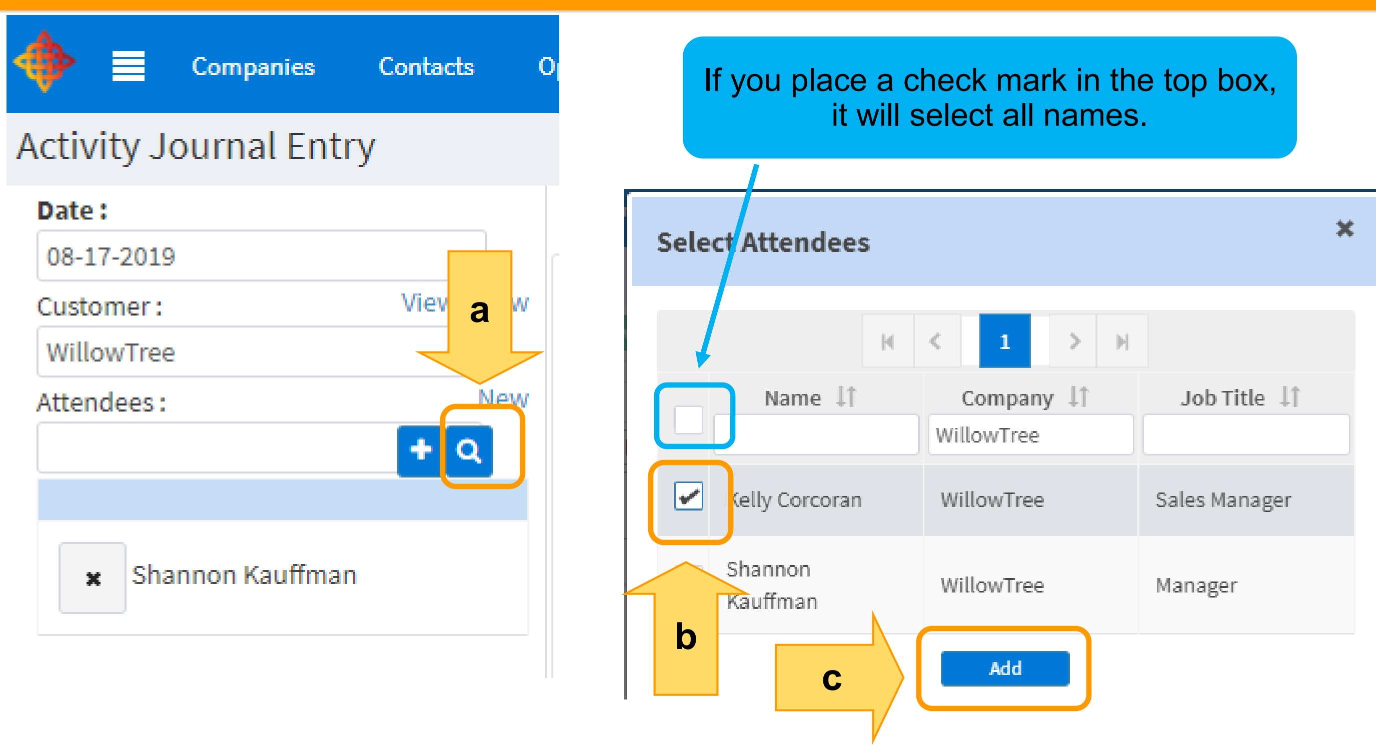


5. Type name in by hand.
6. Left click "+" sign to add the name. **OR**
   a. Left click magnifier to choose name from contact list.
   b. Place check mark next to desired name(s).
   c. Left click "Add."

This image shows how to add a name by hand.

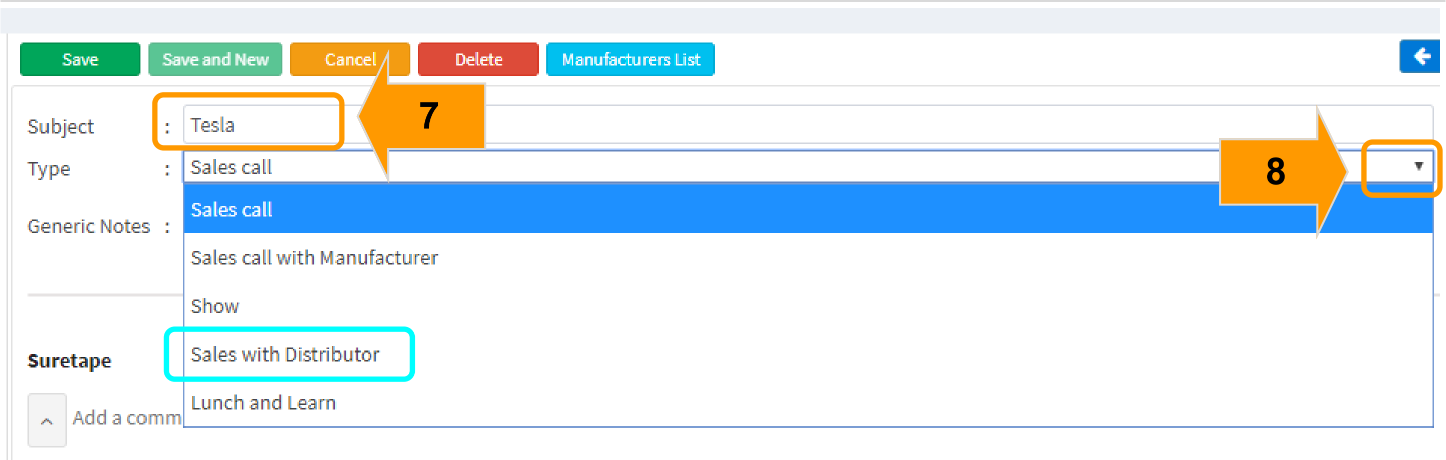


These images show how to search for a contact name.

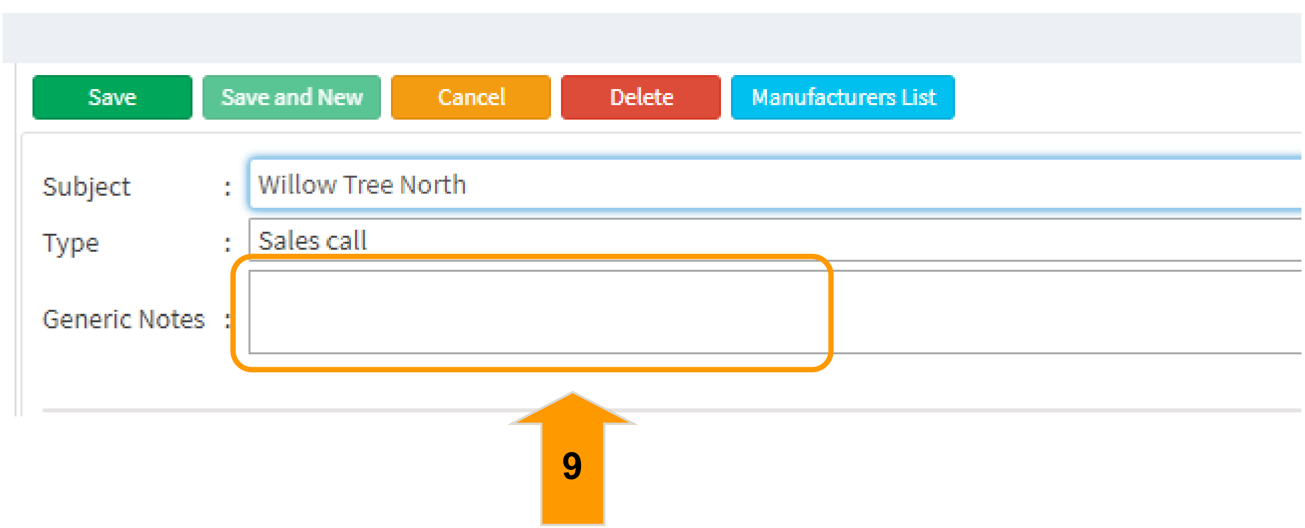


7. Type in “Subject” field. If no subject is added, it will default to the call type. *Optional*
8. Select the drop-down for which call type, such as “Call with Distributor” *Optional*
9. Add “Generic Notes” for notes about the contact and the meeting that are not line specific. CAUTION: “General Notes” 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.



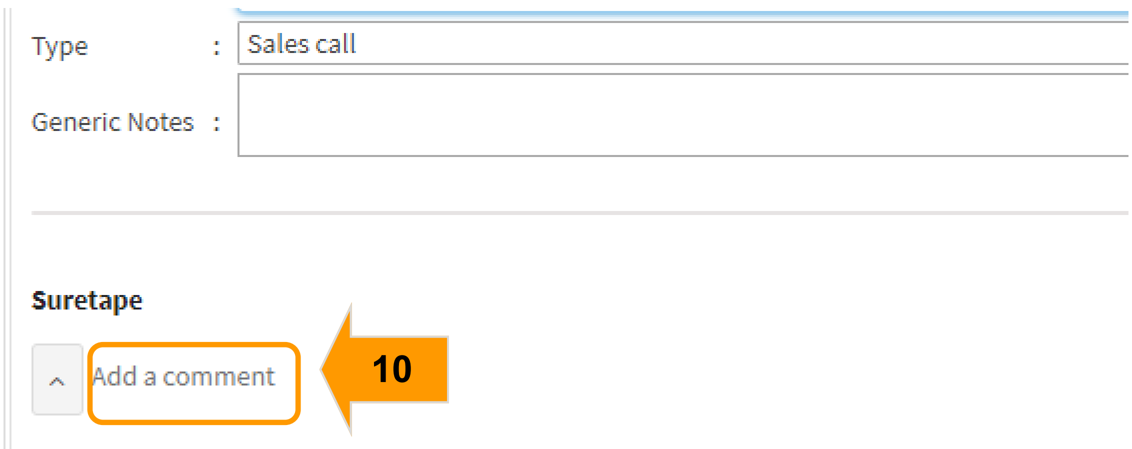
This image shows the “Generic Notes” field (which we will leave blank for now).



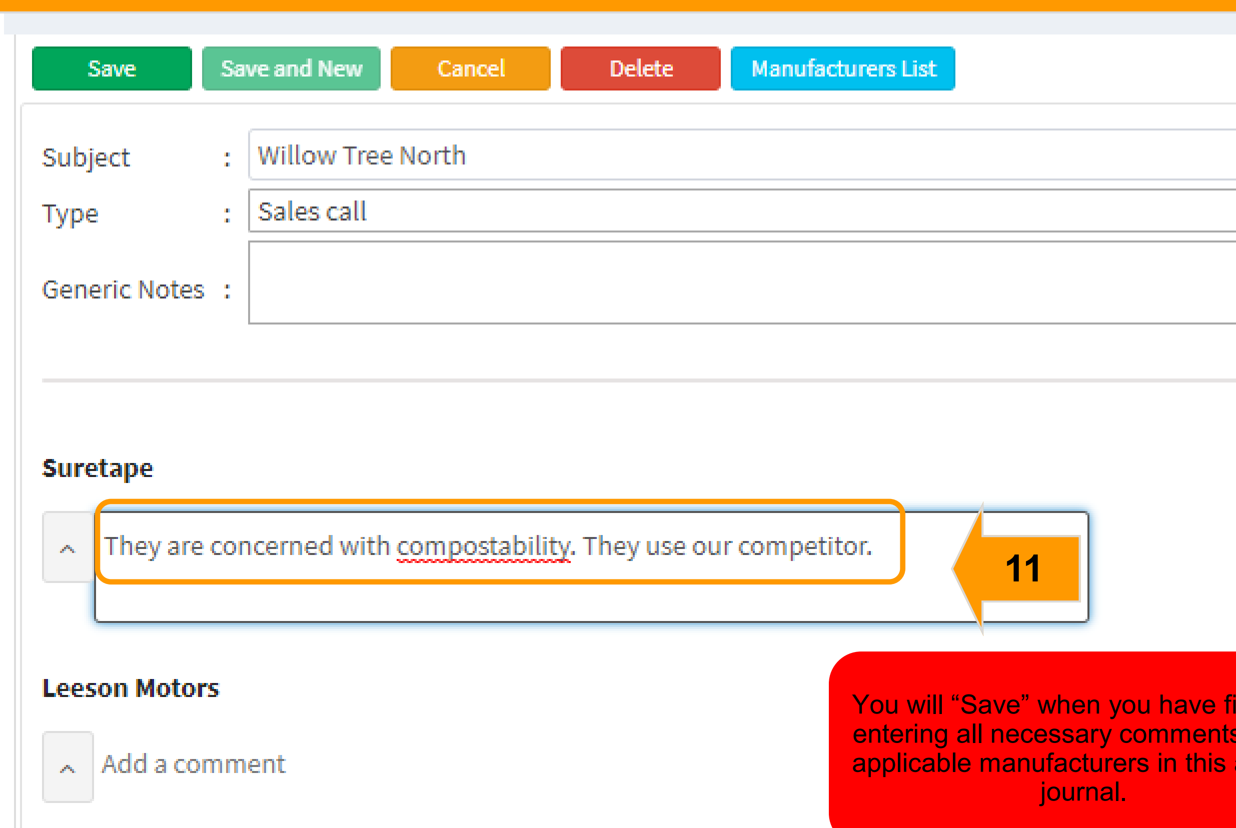
Hand type information:

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.



This image shows a comment by typing it out.

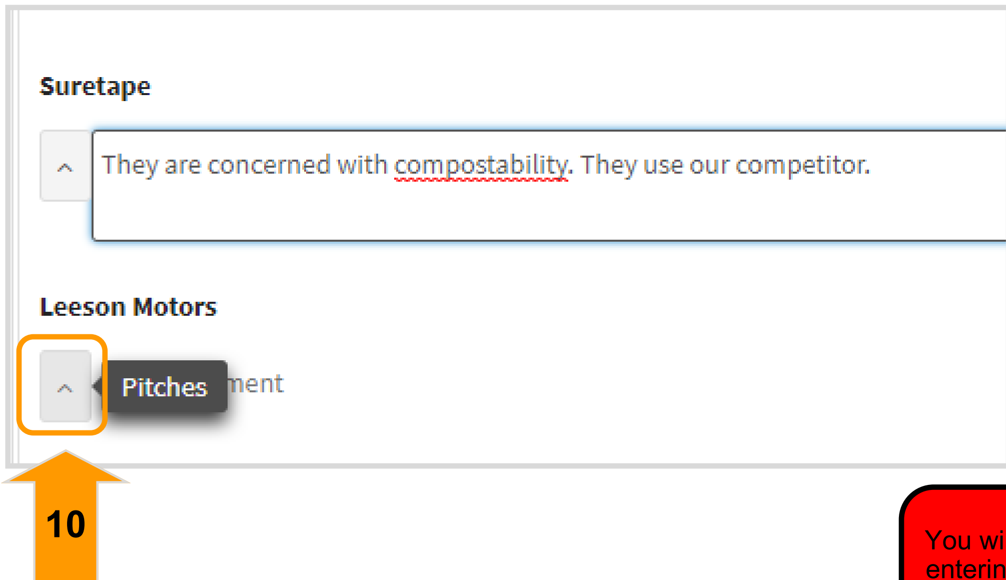


You will "Save" when you have finished entering all necessary comments for all applicable manufacturers in this activity journal.

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."

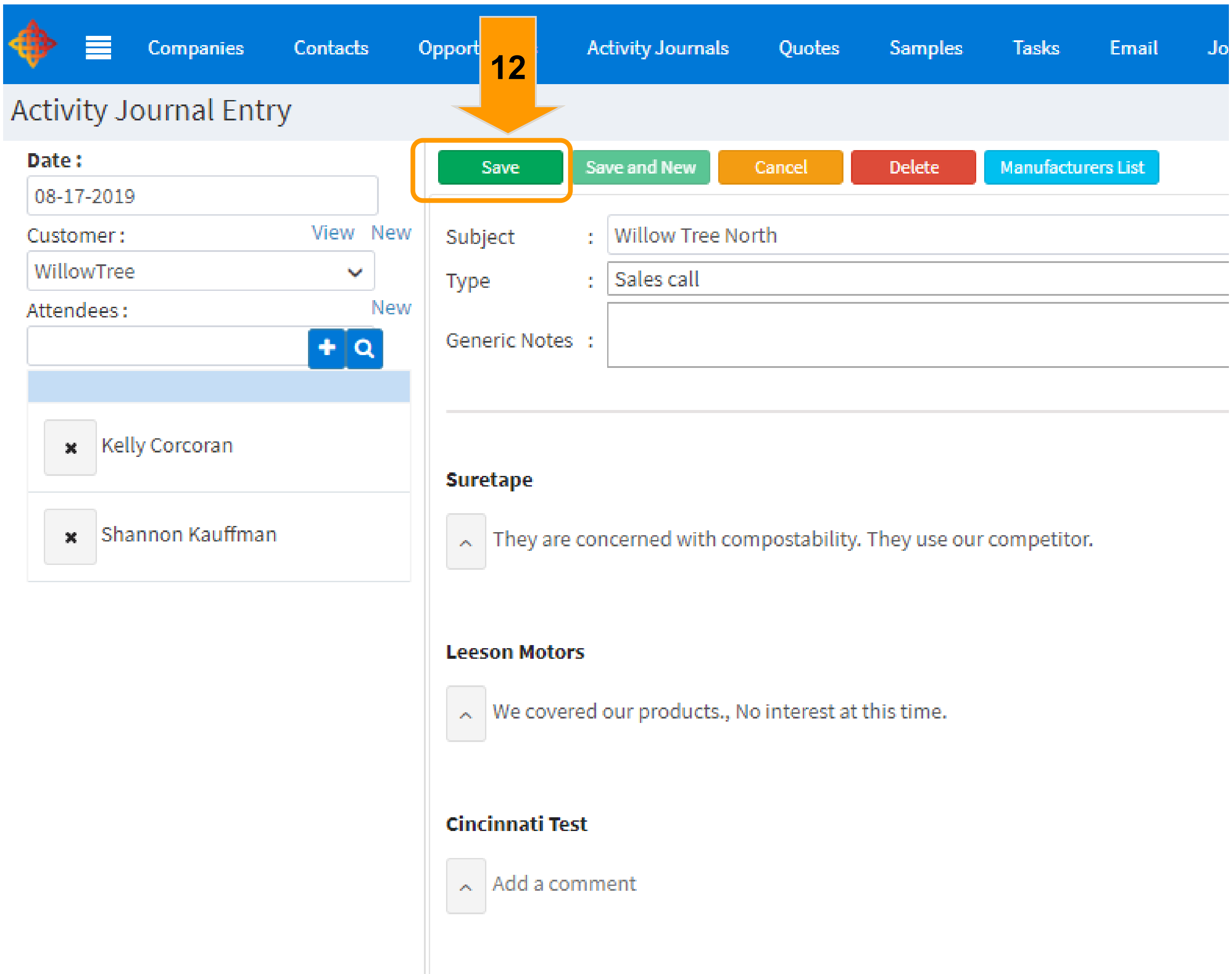
These images show how to use "Pitches" (auto-text) to enter frequently-typed comments quickly.



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

12. Left click “Save.”

This image shows the finished Activity Journal Entry.



This concludes the instructions for this section.

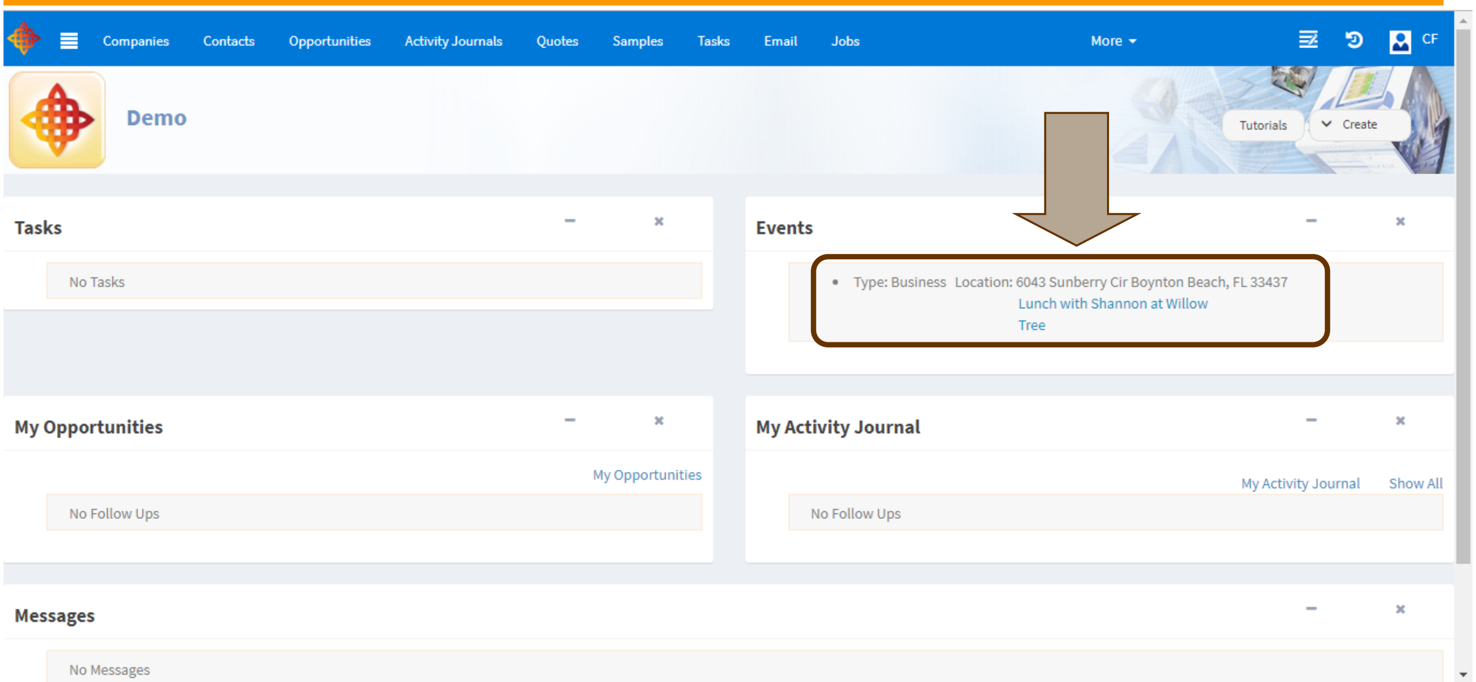
Activity Journal - How to Make Call Notes & Reminders using an Event Link on Home Page (web portal)

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.

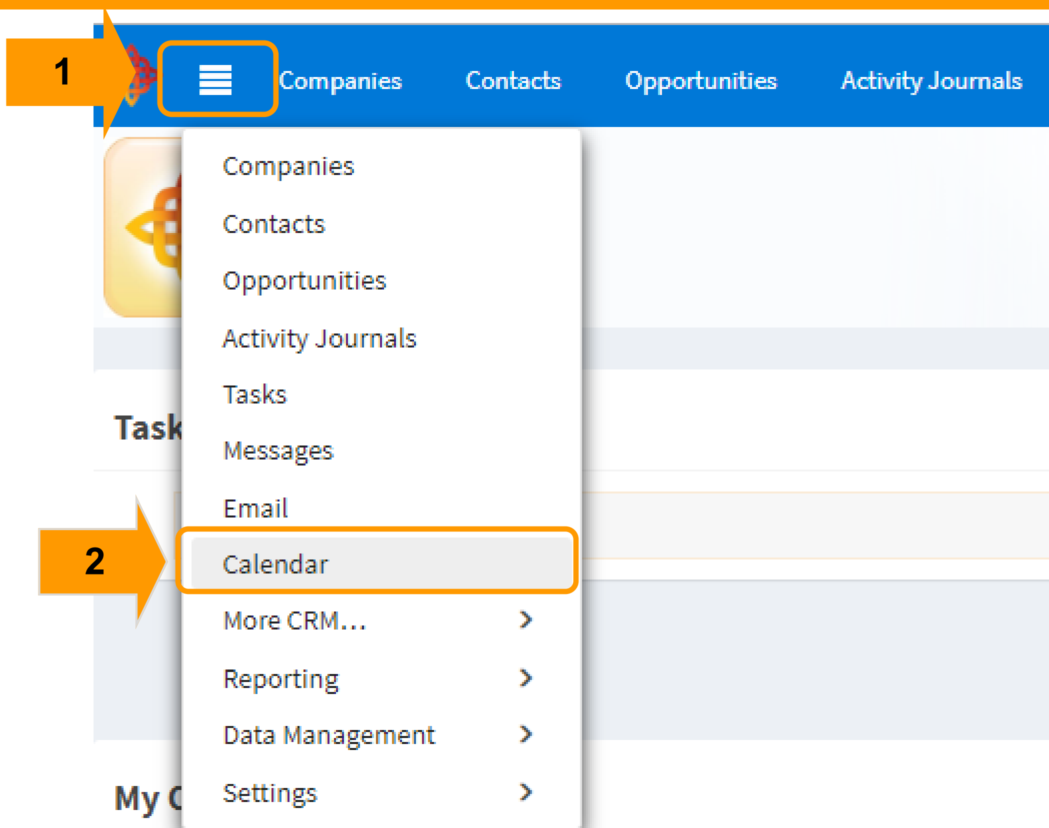
This image shows a sample Home Screen. Left click desired Event.



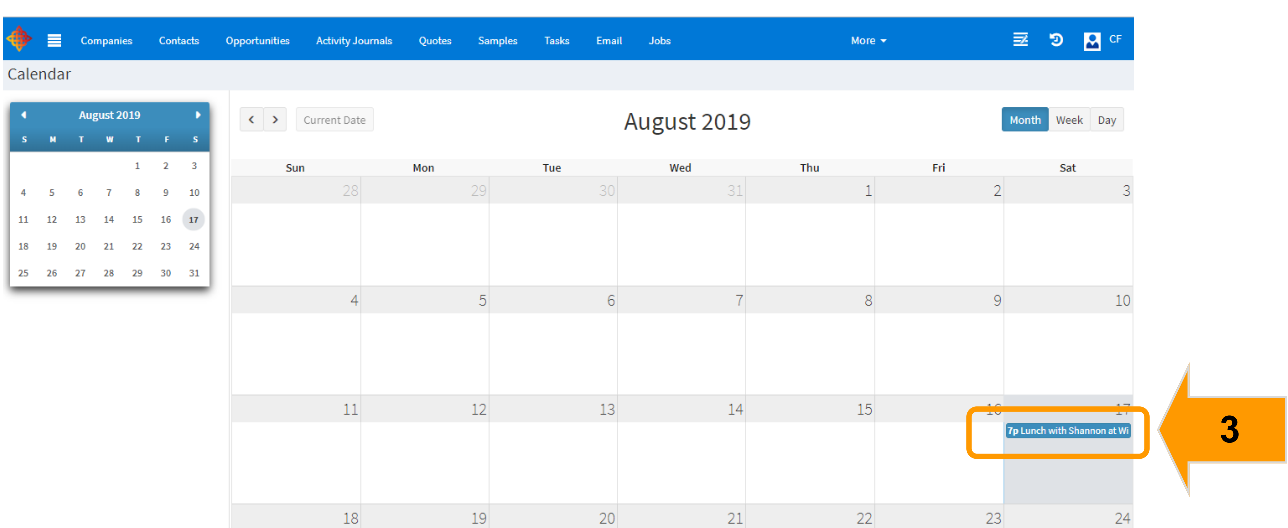
How to Make Call Notes & Reminders from Calendar (web portal)

1. Left click menu icon.
2. Left click “Calendar.”
3. Left click desired event.

This image shows where to find the menu and “Calendar.”



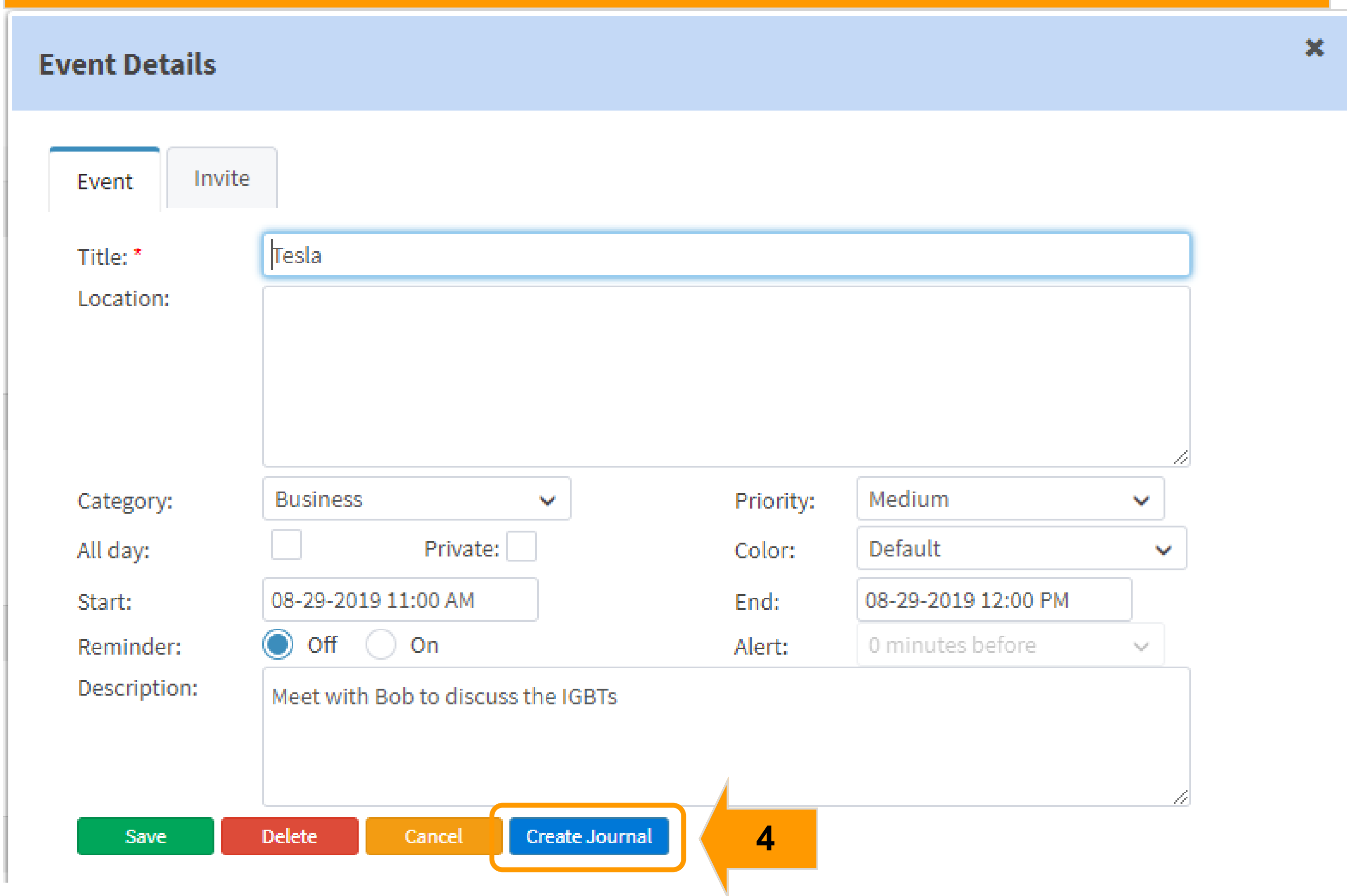
This image shows a sample appointment on the calendar.



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.



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

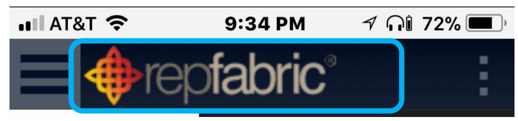
Call types make classifying the amount of effort put into a particular product line very simple for insightful comparisons against the dollars that line generates.

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

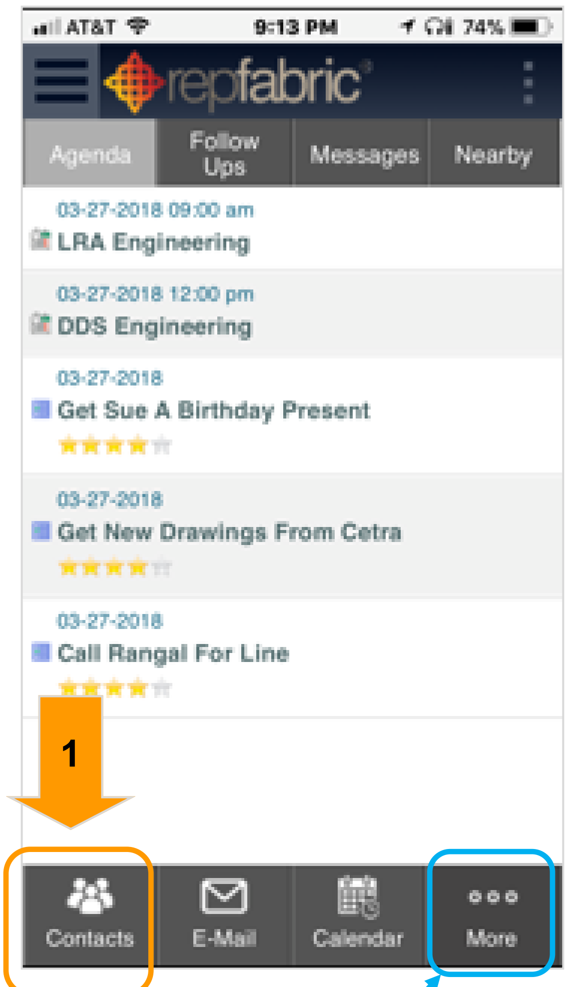
The advantage to entering an Activity Journal entry in a Contact is that the Company (aka Customer) will automatically populate. If you want to access the Home screen, Tap the Repfabric logo.

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

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

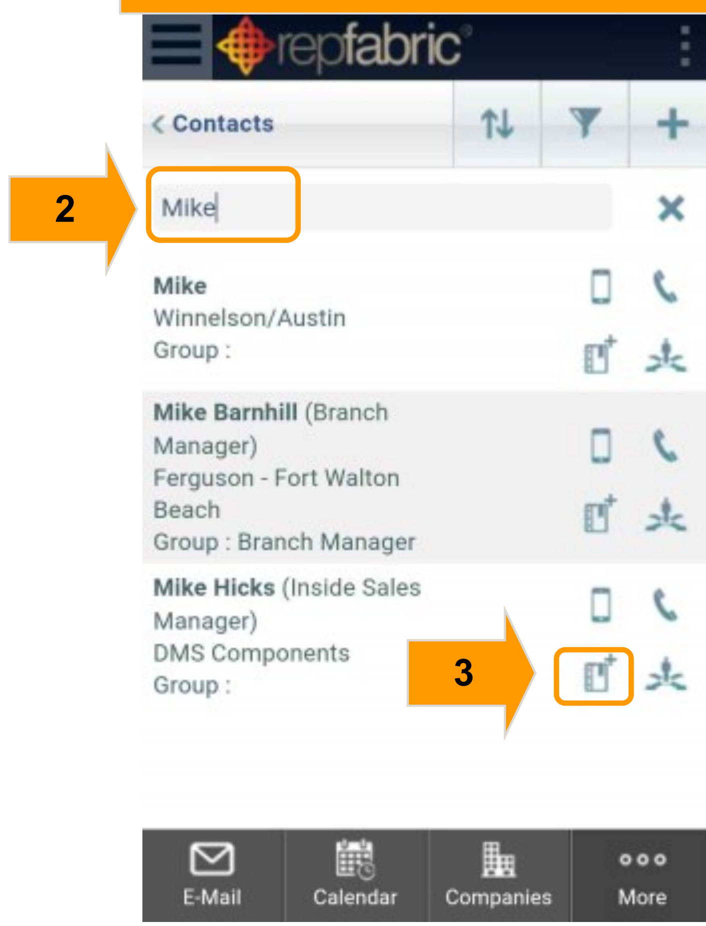


This image shows where to tap "Contacts."



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.

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

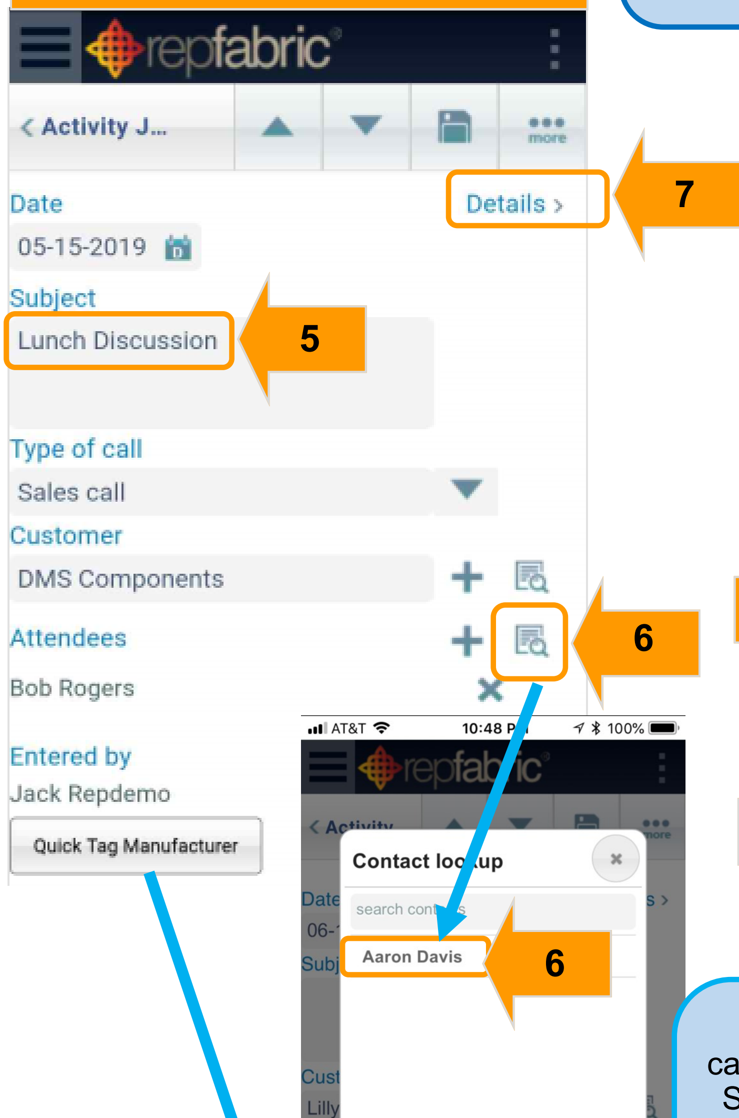


5. Dictate or type in "Subject" (if blank, Type of Call will be auto-inserted) *Optional*
6. Tap magnifying glass & select a contact person (plus sign will create a new contact).
7. Tap "Details."
8. Dictate or type in comments about the line discussed during the call.
9. Add comments to additional lines(s)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

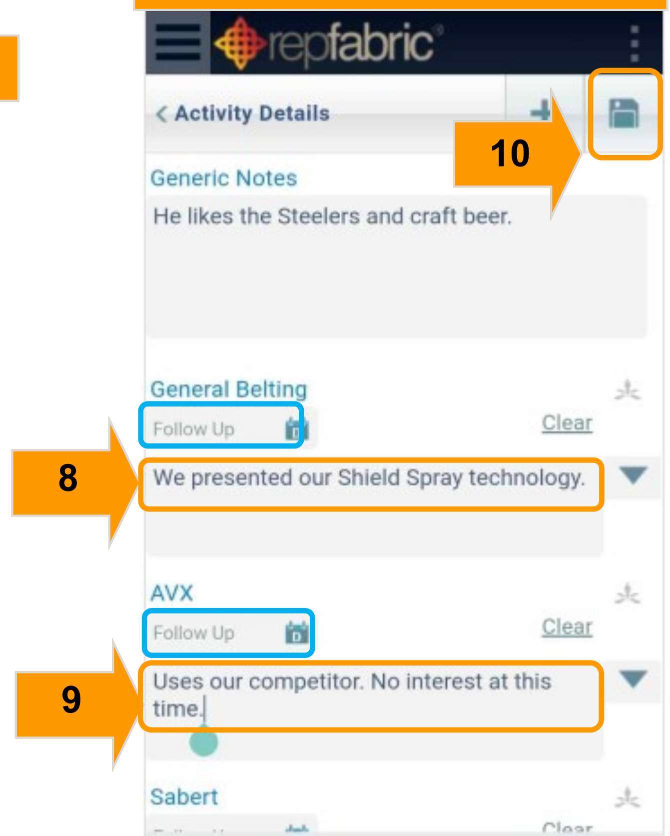
Optionally fill in:
Type of call: Sales call, Sales call with Distributor, etc.

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."



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



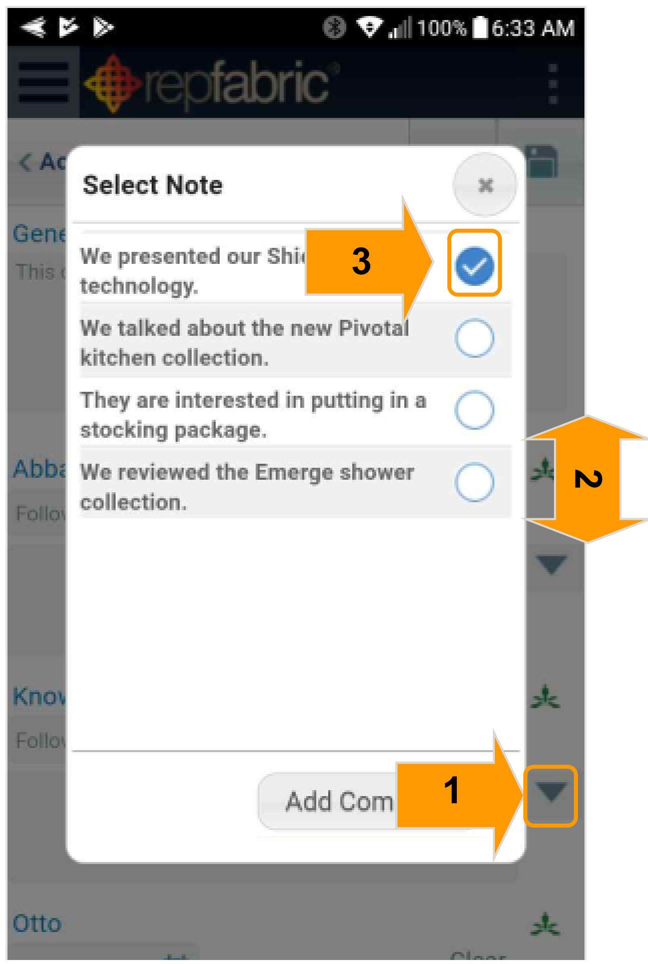
"Quick Tag" allows you to filter for just the lines discussed without scrolling through dozens of lines if you have long line card.

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.



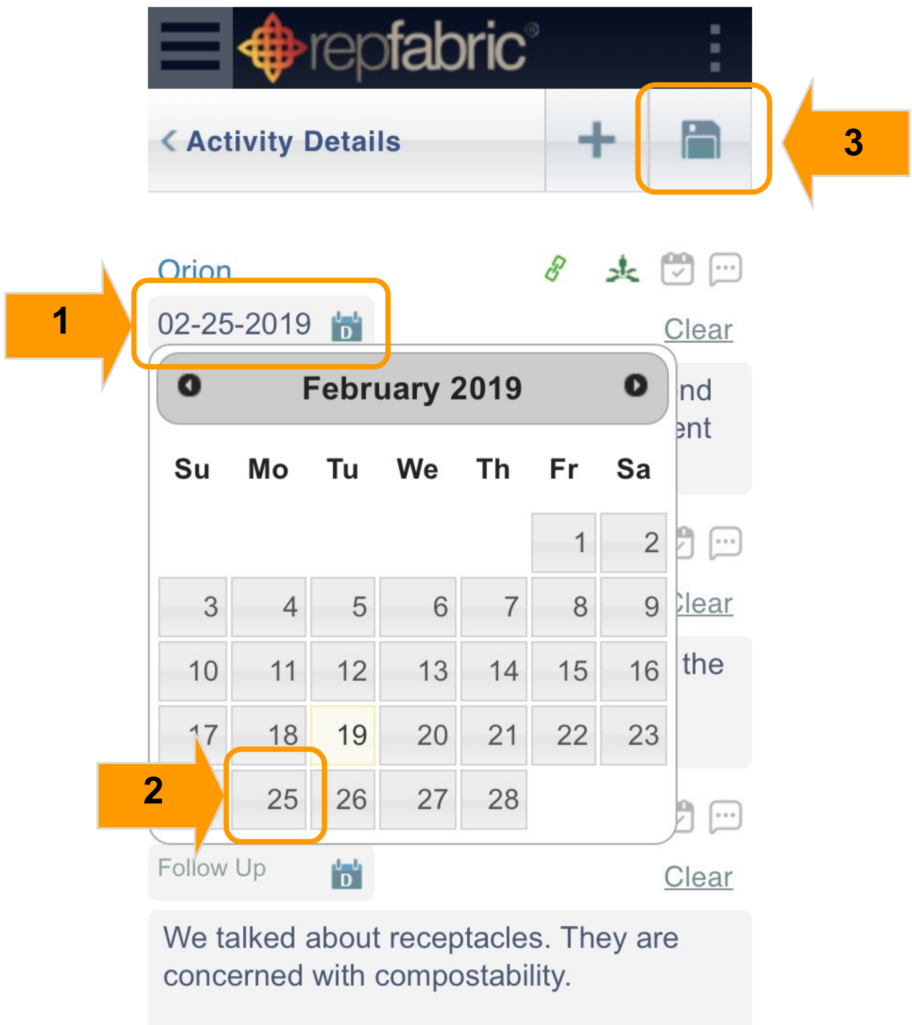
If you tap "Follow Up" above any entry, a calendar will pop up from bottom of the screen. Select a date for follow up on this entry. You can see all "follow ups" on the Home page or sort by "follow up" when viewing a list of Companies or Contacts. The mobile app follow-up tab and morning email reminder 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.”

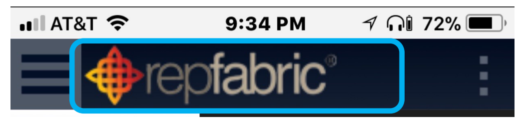


This concludes the instructions for this section.

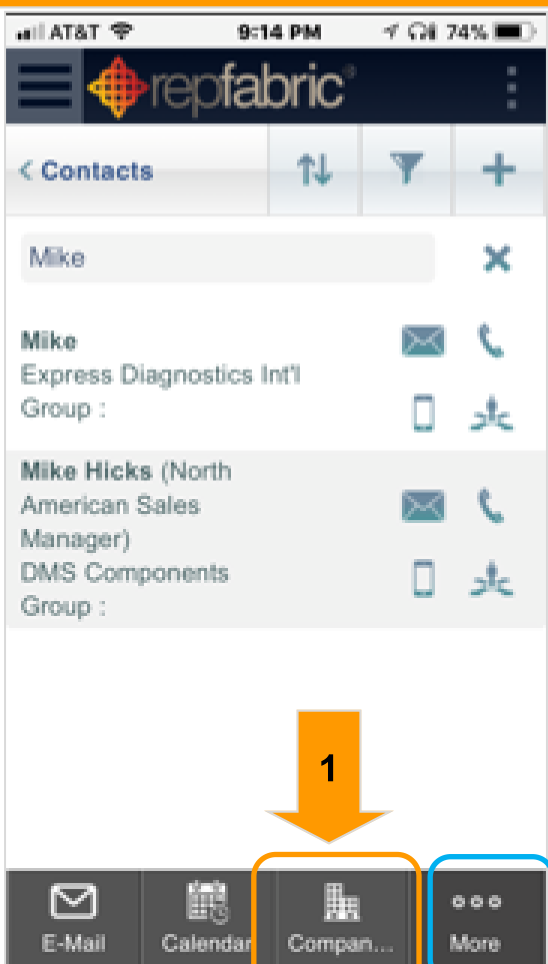
Activity Journal - How to Make Call Notes on Mobile App in a Company

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

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

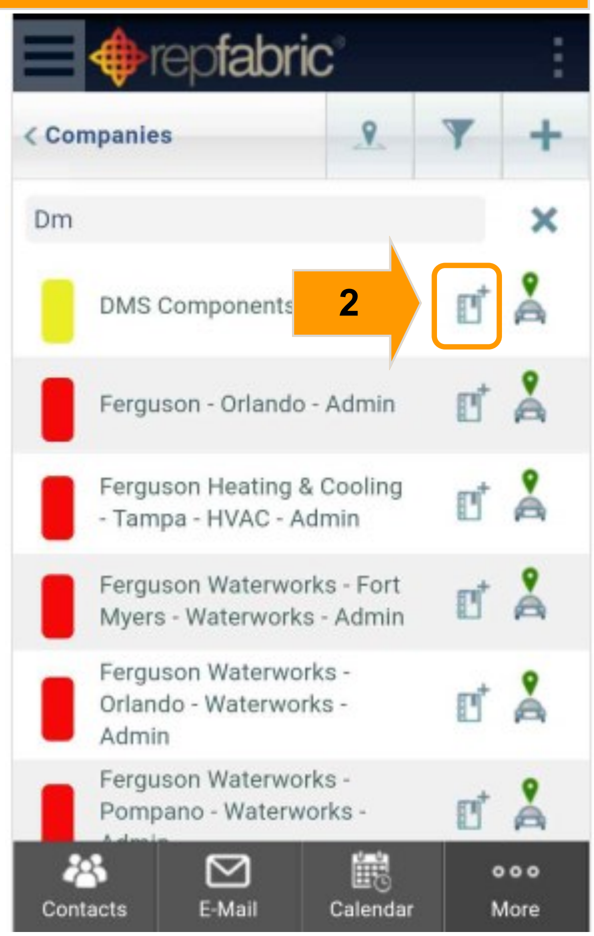


This image shows the “Companies” button.



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.

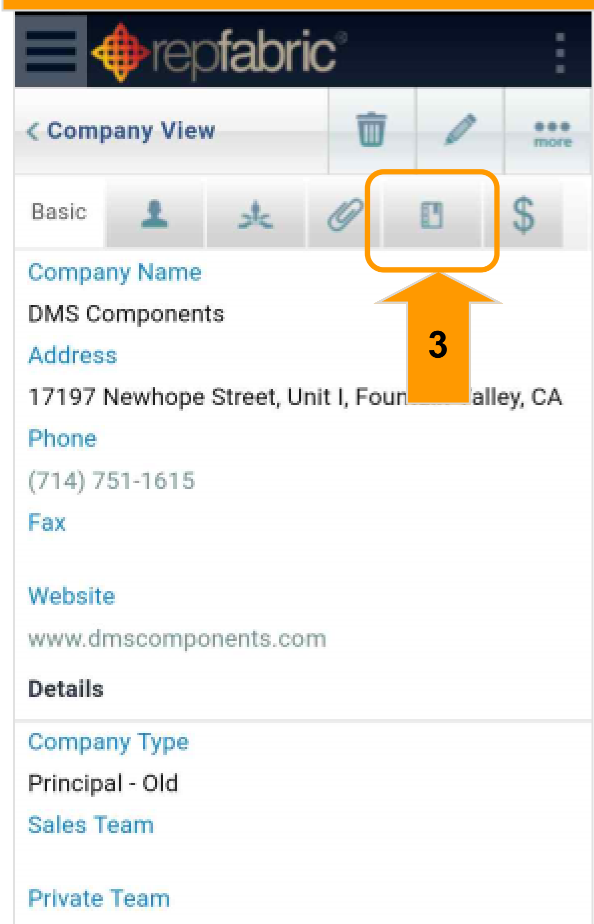
This image shows a sample list of Companies.



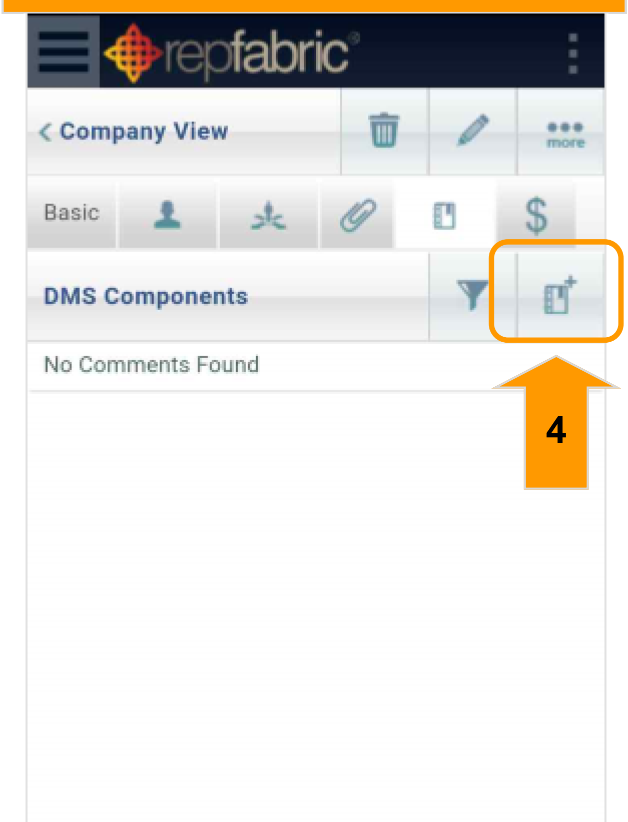
OPTION: Instead of the list view pictured in the prior screen shot, you can also add an Activity Journal within a company per the procedure below.

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

This image shows “Activity Journal” icon.



This image shows “New Activity Journal” icon.

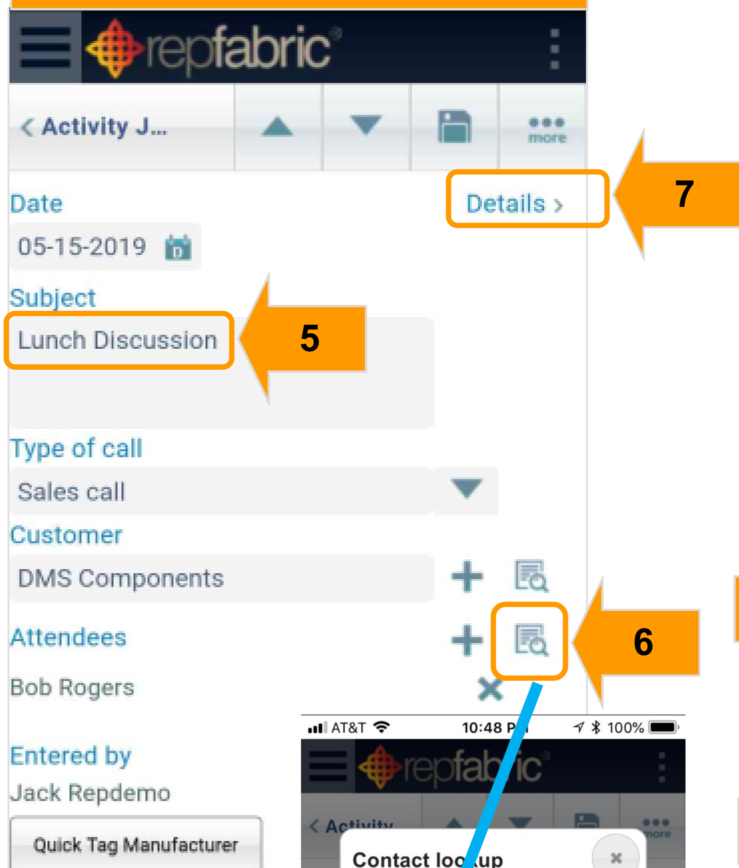


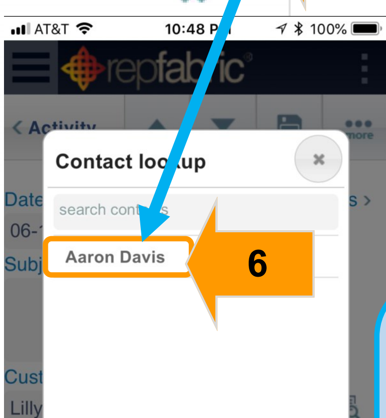
5. Dictate or type in “Subject” (if blank, Type of Call will be auto-inserted). *Optional*
6. Tap magnifying glass & select a contact person (plus sign will create a new contact).
7. Tap “Details.”
8. Dictate or type in comments about the line discussed during the call.
9. Add comments to additional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

Optionally fill in:
Type of call: Sales call, Sales call with Distributor, etc.

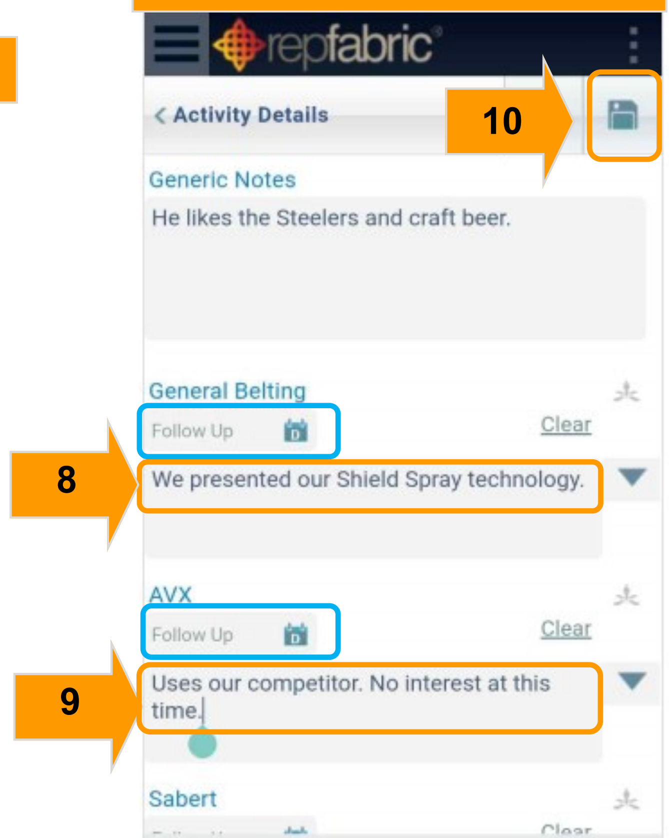
Generic Notes: these notes are **NOT** manufacturer specific and can be used for your own personal memory trigger.
“He likes the Steelers”

This image shows the “Subject” field and “Details.”





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



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

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).

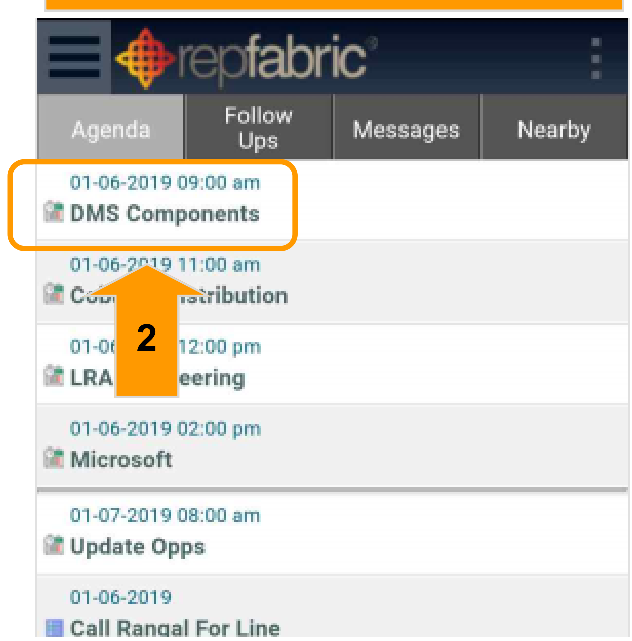
Activity Journal - How to Make Call Notes on Mobile App in a Calendar Event

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."

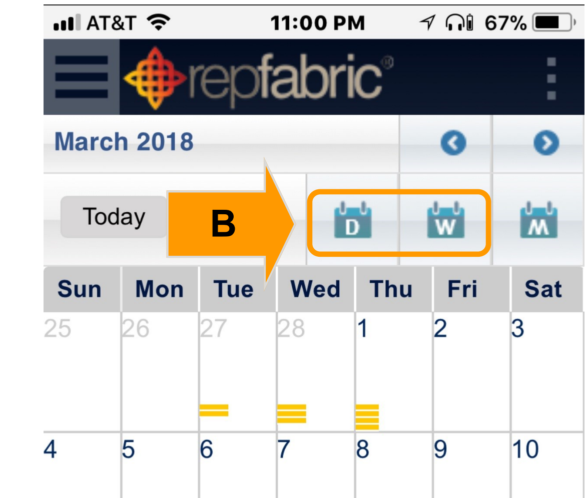
This image shows the "Events" for today in the "Agenda" tab.



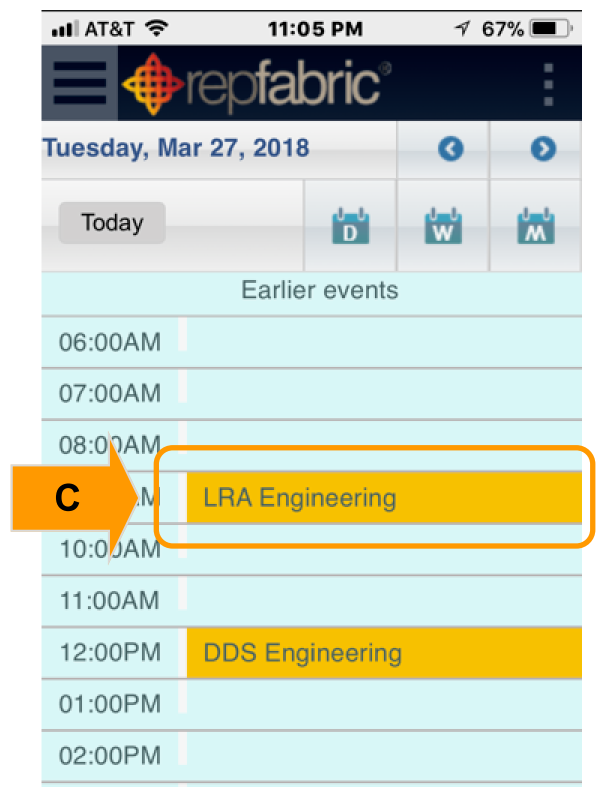
OPTION: If you need to navigate to another date to find the desired event link:

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

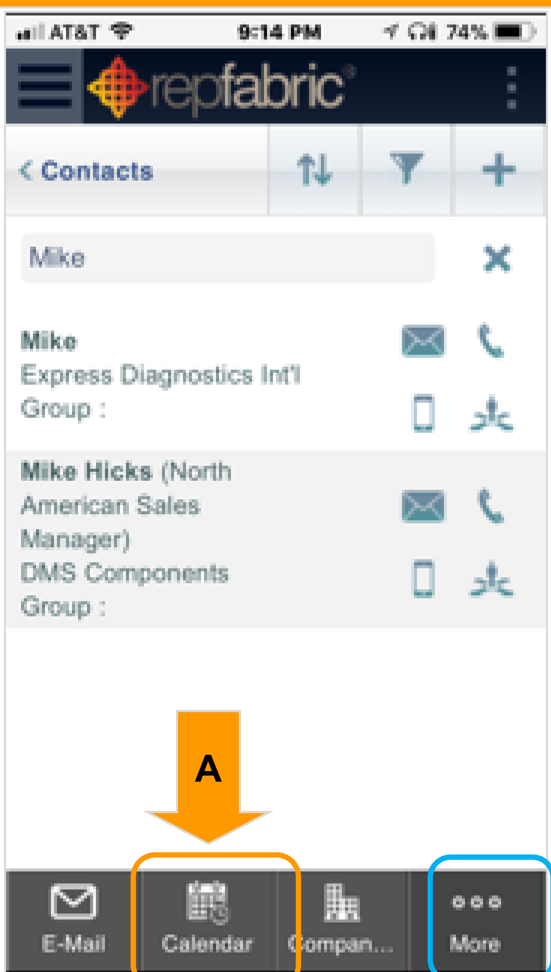
This image shows the “Day” and “Week” icons.



This image shows a sample day on the Calendar.



This image shows the “Calendar” button.

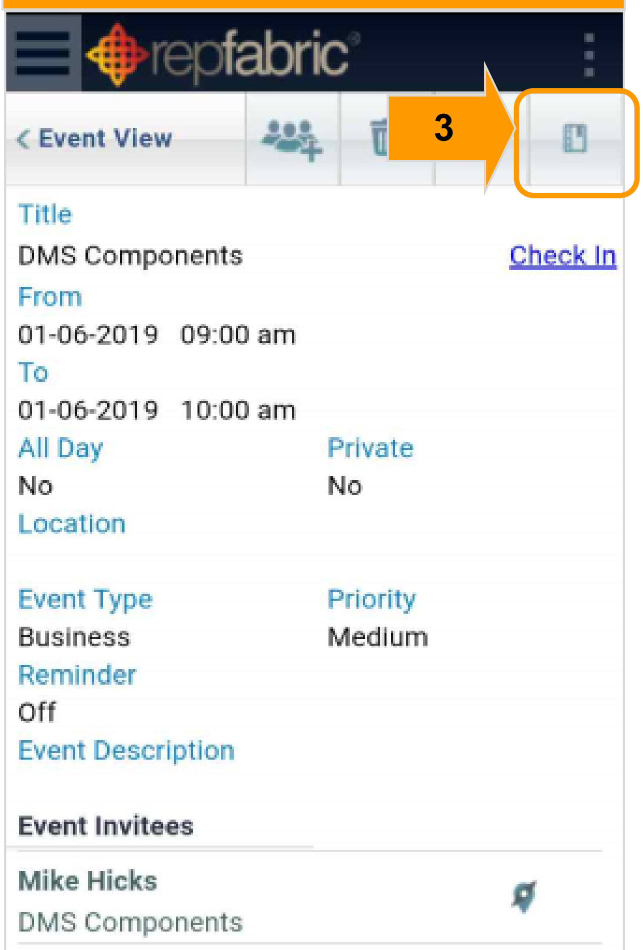


If you do not see the button you are looking for, tap “More” If you do not see any buttons, tap the Repfabric logo to return to “Home” screen.

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.

This image shows the “Activity Journal” icon.

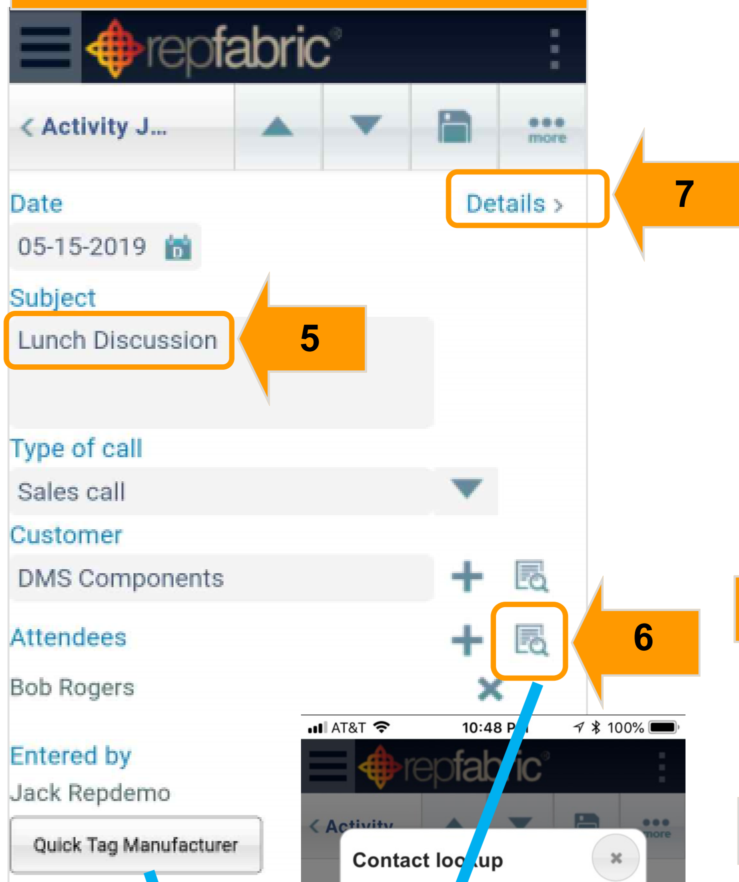


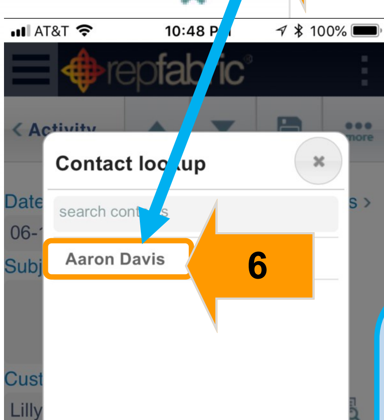
5. (Optional) Dictate or type in “Subject” (if blank, Type of Call will be auto-inserted)
6. Tap magnifying glass & select a contact person (plus sign will create a new contact).
7. Tap “Details.”
8. Dictate or type in comments about the line discussed during the call.
9. Add comments to additional lines(s)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

Optionally fill in:
Type of call: Sales call, Sales call with Distributor, etc.

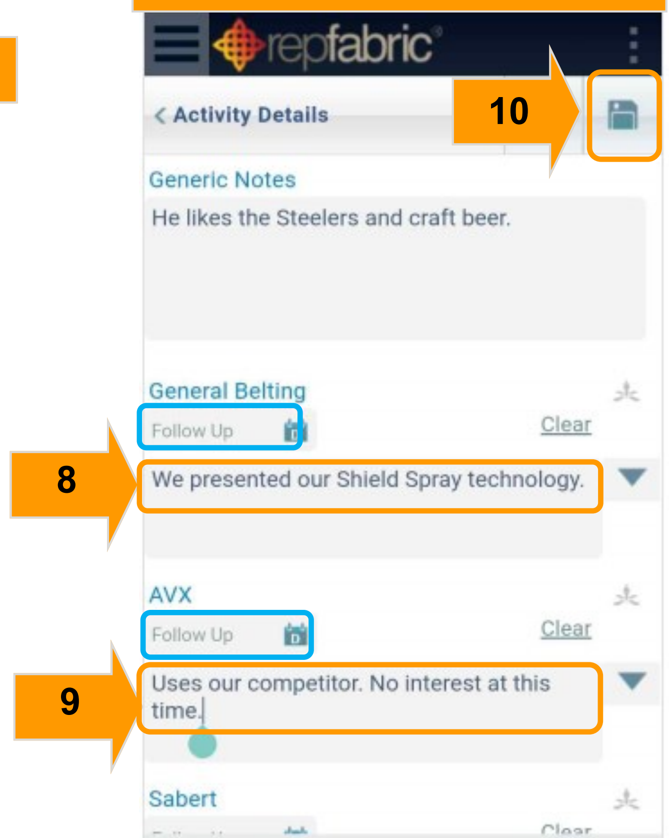
Generic Notes: these notes are **NOT** manufacturer specific and can be used for your own personal memory trigger.
“He likes the Steelers”

This image shows the “Subject” field and “Details.”





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



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

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.

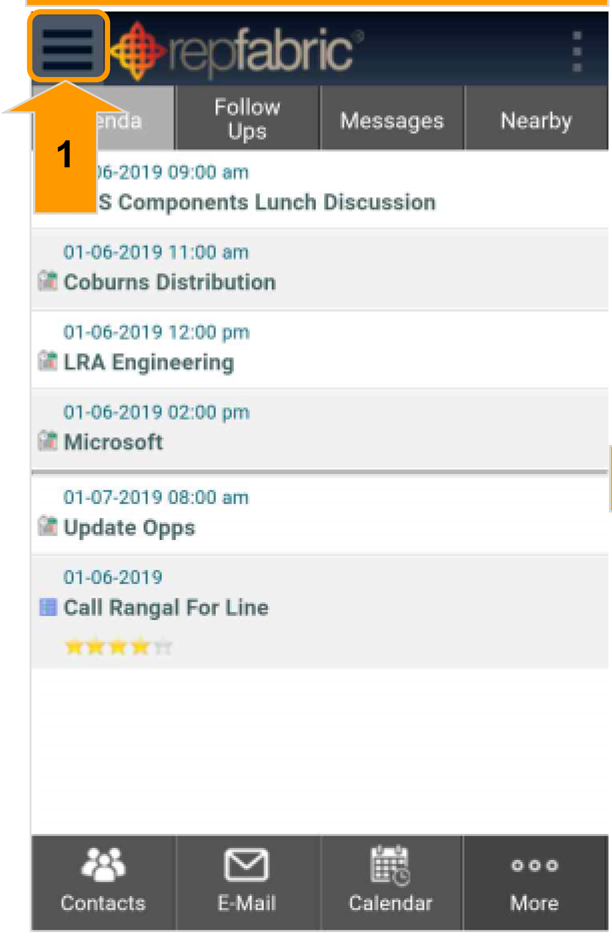
This concludes the instructions for this section.

How do I find Activity Journals I've already created in the mobile app?

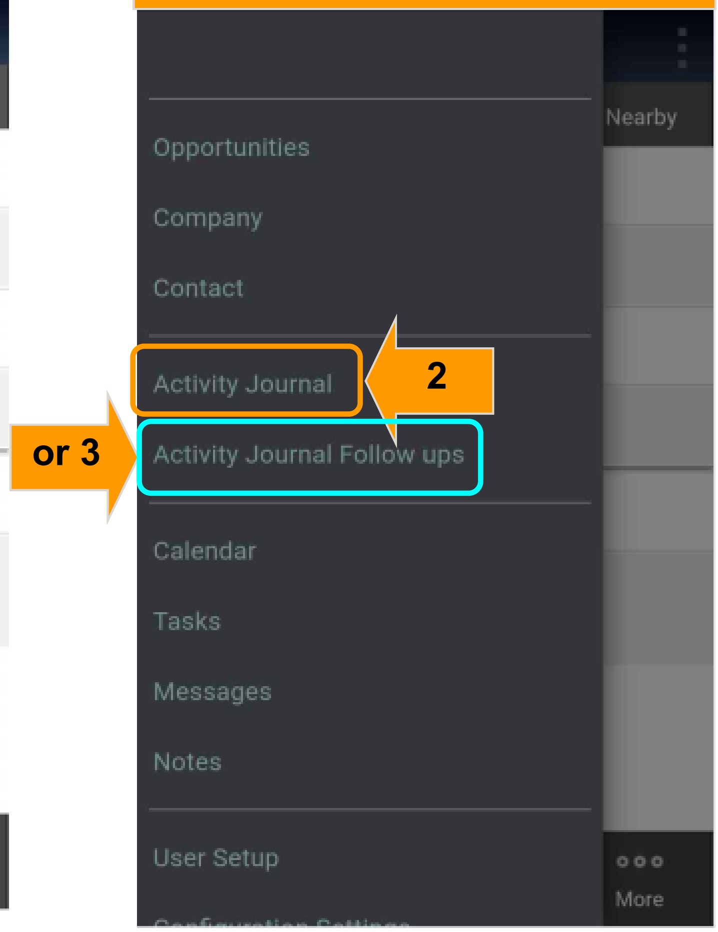
You can review and edit activity journals you have already completed. In addition, you will receive a daily email of activities you completed the day before.

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.

This image shows the app home screen.



This image shows the menu area to select the activity journal lists.



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.

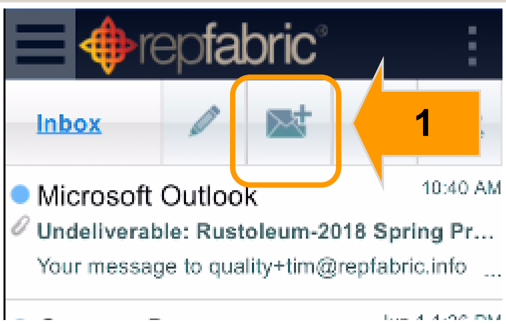
How to create an email using a “Canned Pitch” in Mobile App

A Pitch is a template of text and/or pictures you can reuse when composing e-mails to customers. If you create them for different product families of each manufacturer, all sales people will be able to use them when communicating with their customers.

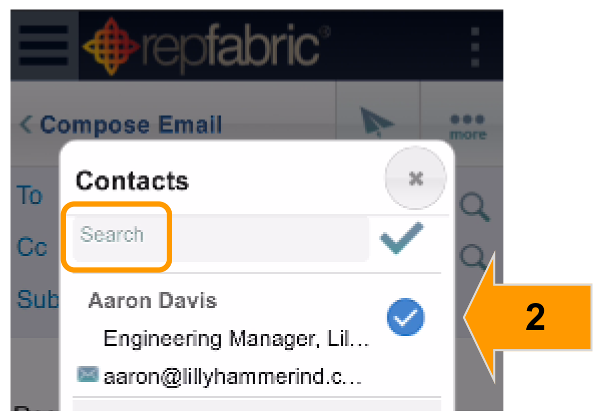
On the mobile phone, this is especially helpful to save yourself time doing follow up emails immediately after completion of the sales call, rather than at the end of the day. As soon as you walk out of the sales call, open an email and insert pitch on the product line with a sentence like, "Joe, here's the product info I promised." Below are screen shots in the mobile app showing what it looks like to insert a pitch.

1. From the email area, create a new email using the email + icon.
2. Search for the contact, select their name.
3. Tap the three blue dots for “More”
4. Tap “Insert Pitch”

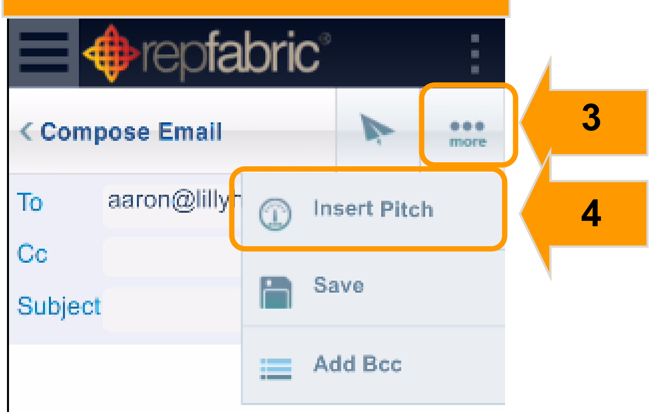
Tap the “compose” button.



After placing check mark next to desired recipient, scroll back to the top of the window. Tap the check mark next to search field.

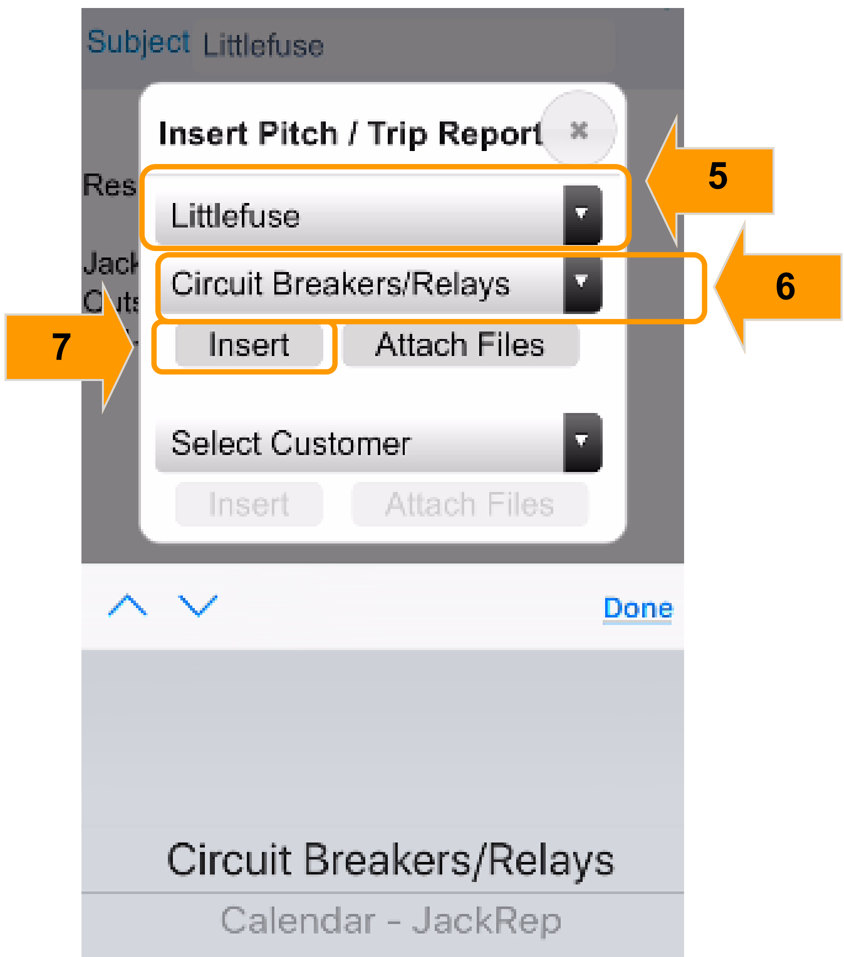


Tap three dots to bring up menu containing “Insert Pitch.”



5. Select the manufacturer from the drop-down menu that has the pre-written email you want to send this customer.
6. Select the specific email or “Pitch” you want to insert from that drop-down menu.
7. Tap insert. A preview will appear so you can see it before it goes into the email. Click insert again on the preview window and it will appear in the body of your email and you can hit send (the paper airplane).

There are drop-downs for principle or customer and corresponding pitch or overview. Use additional buttons to insert or attach a file.



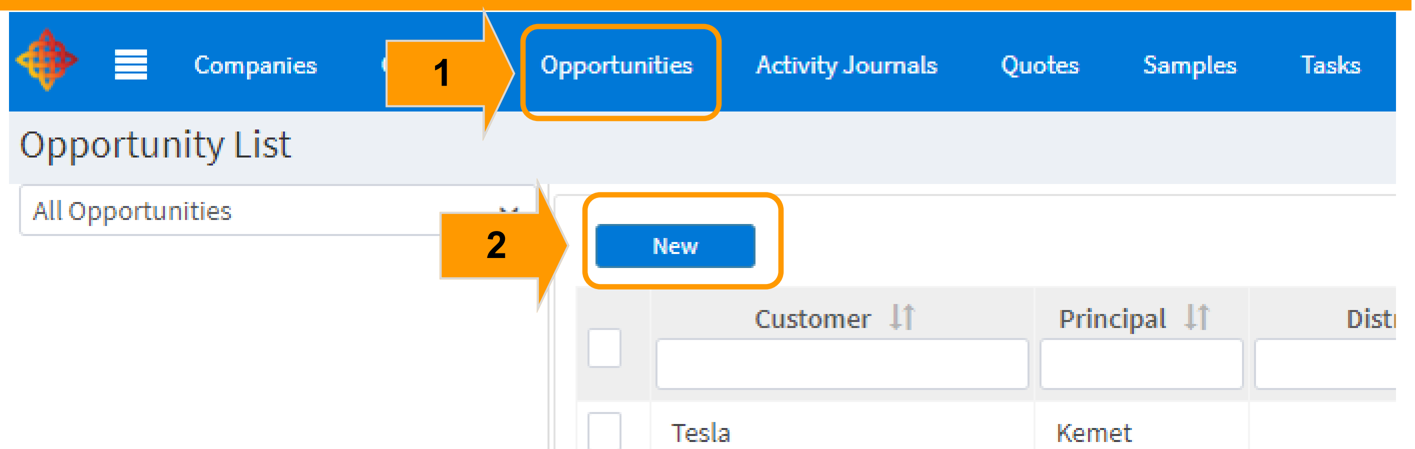
This concludes the instructions for this section.

How to Create an Opportunity in the Web Portal

You add an opportunity in the system to keep track of all interactions you have with the customer, manufacturer and distributor of a deal you are working for new business. Opportunities can be created in your instance of Repfabric online, your e-mail service (i.e. Outlook or Gmail) with our Sync+ plugin, and on the Repfabric mobile app. This tutorial shows you how to create an opportunity in the online portal.

1. Left click “Opportunities.”
2. Left click “New.”

This image shows where to find “Opportunities” and “New”

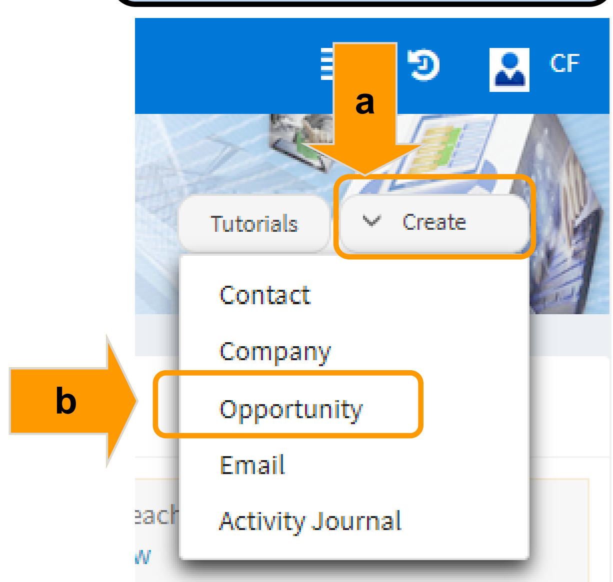


This image shows the “Create” button in the top right corner of most screens.

OR

a. Left click “Create.”
b. Left click “Opportunity.”

You can always use the “Create” button in the top right corner of Repfabric online.



1. **Customer:** enter customer name

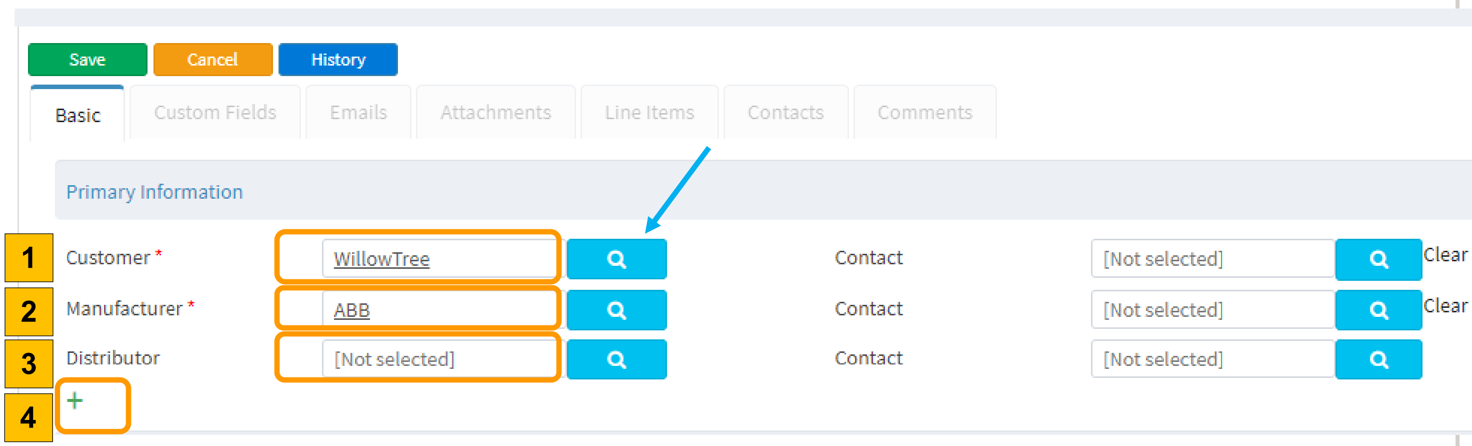
2. **Manufacturer/Principal:** choose from your list of principals/manufacturers.

3. **Distributor:** choose from your list of distributors

4. **Other Parties:** tap the plus sign to add other companies that participate in some manner with this opportunity as well. In Electroincs, this could be CEMs, and in building industries this could be Architects or Engineering Firms for example.

- ☐ **Contact:** customer contact name
- ☐ **Contact:** manufacturer contact name
- ☐ **Contact:** distributor contact name

This image shows the “Primary Information” you may want to fill in.
Use magnifiers to search for Customers, Manufacturers, etc.



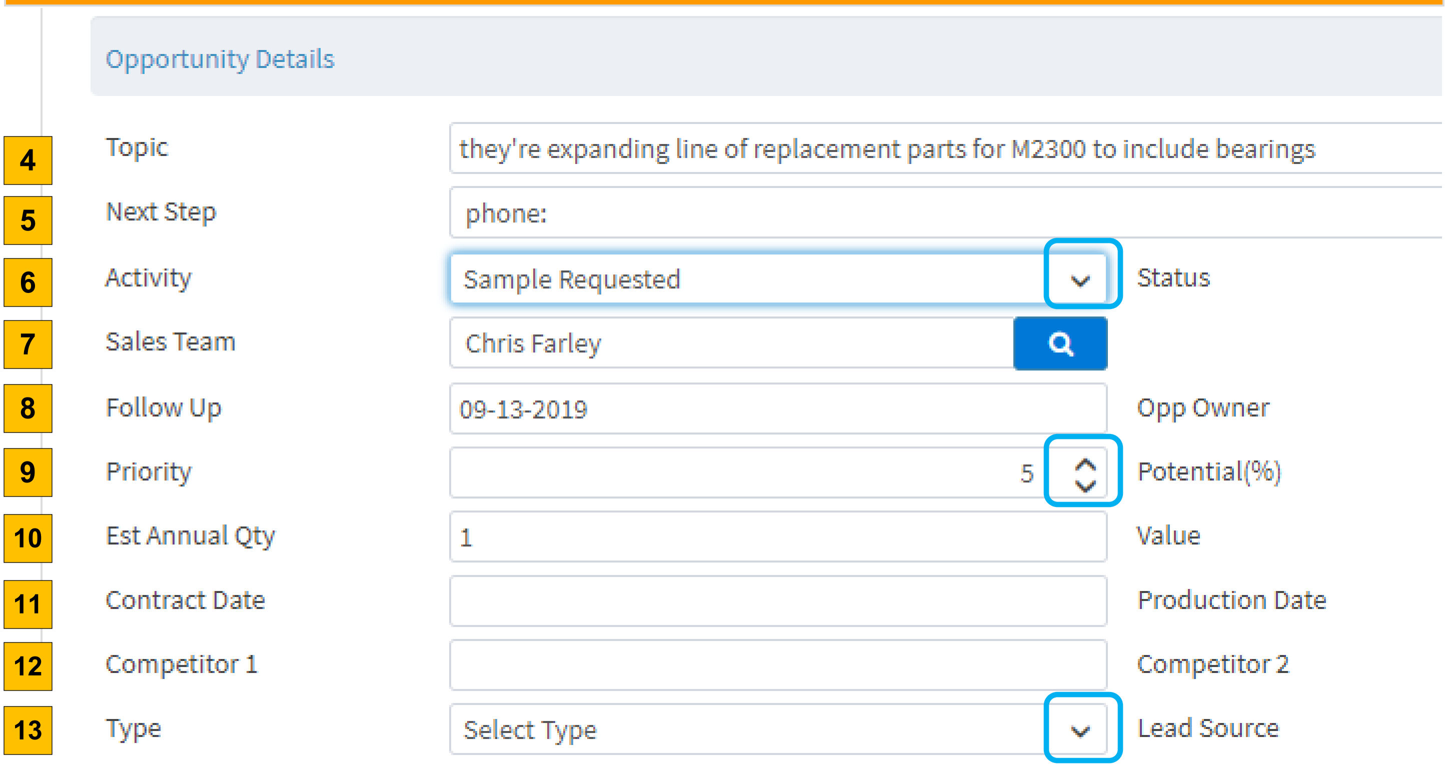
Some Repfabric users have a point -of-purchase or point-of-sale business model where the distributor can act like the end customer. If that is the case, the setting was adjusted in the configuration phase when the instance of Repfabric was set up for your company.

If your distributors are assigned a sales team, then you can use companies with a distributor type interchangeably in either the customer field or the distributor tab. If you have one and not the other it's okay.

The minimum in an opportunity, if you are of the point-of-purchase business model, is a customer OR distributor AND a manufacturer. At a minimum for all opportunities is to designate a manufacturer (principal) and a customer if you are not a point-of-purchase business model.

4. **Topic:** Give this particular opportunity a brief phrase, 3-4 words that will help you differentiate it from other opportunities you may have with the same manufacturer or customer.
5. **Next Step:** Enter the next step to take with this Opportunity. You may want to consider a convention of key words to help you further sort your opportunities. For example, if you enter 'phone,' 'email' or 'drop in' in the next step then you can quickly search that column and knock out all your emails while you are at the desk or, perhaps later in the day between appointments, you could search for "phone" and knock out all your calls.
6. **Activity:** Use the drop-down list to enter the current activity for this opportunity.
7. **Sales Team:** The Sales Team is auto-selected based on the customer as all customers are assigned to a sales team when they are imported or created in Repfabric. If you want to change the sales team, then you would do that at the Company record.
8. **Follow up:** Enter date for follow up. When an opportunity is created, a date about 7 days later is auto-populated for the follow up date.
9. **Priority:** Assign a level of importance.
10. **Est Annual Quantity:** Enter quantity.
11. **Contract Date:**
12. **Competitor 1:** Who do you have to compete with for this opp?
13. **Type:** Enter the type of opp. Not all customers use this feature. It is a sub-table you can edit and further define what kind of opportunity this is. In the plumbing industry, for example, some clients use this to define if it is a retail or commercial opportunity.

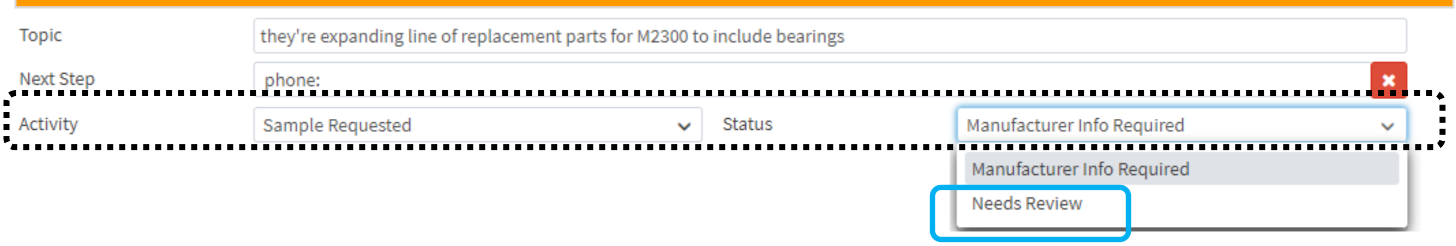
This image shows the "Opportunity Details" section.



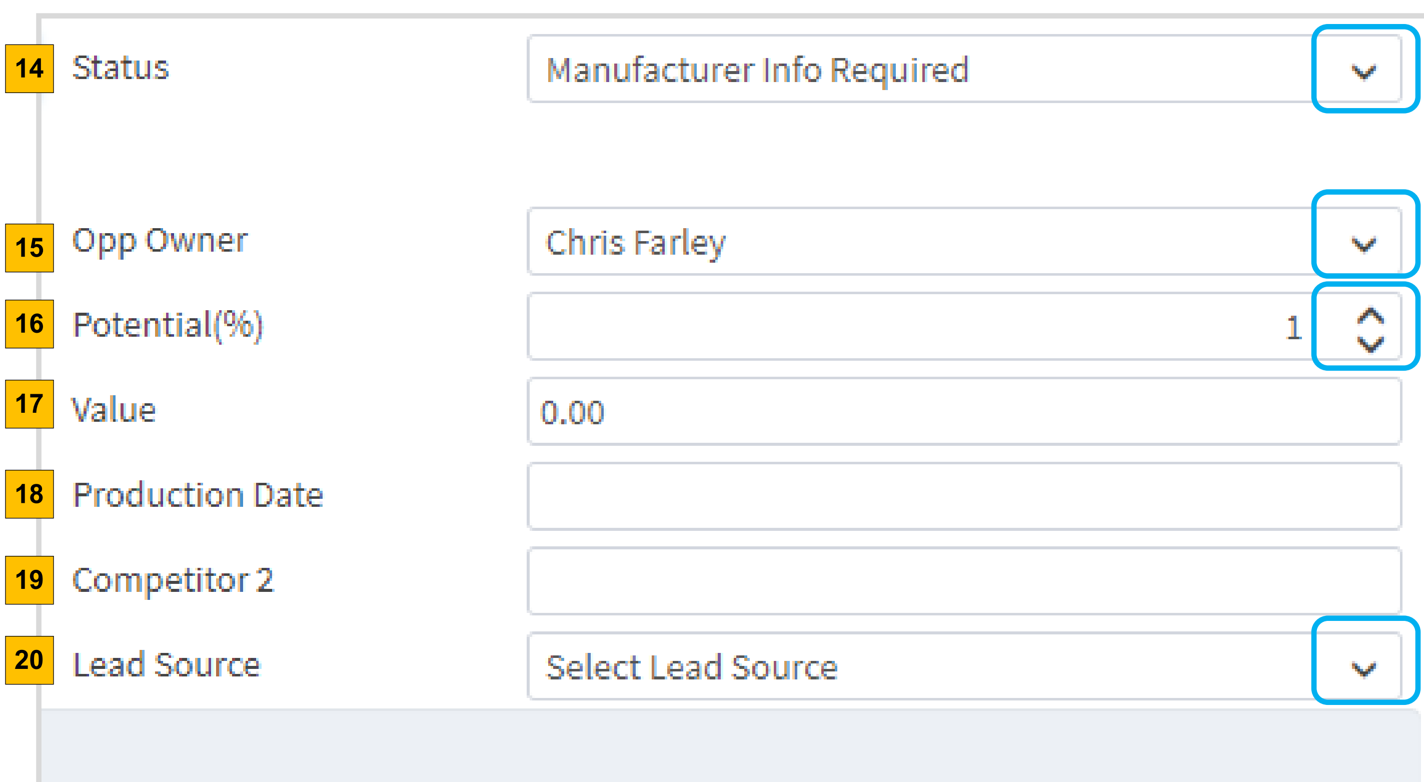
NOTE: The field names above may be renamed by your admin to tailor it to your common business terms for your industry.

14. **Status:** This field will auto-populate based on "Activity", but you can select one other option "Needs Review" if the standard status doesn't work and this opp needs additional attention.
15. **Opp Owner:** Enter sales person working this Opp. This could be you or it could be an inside sales rep who can handle some of the steps in your process.
16. **Potential (%):** Enter percentage likelihood of winning the deal.
17. **Value:** Enter dollar value of opp.
18. **Production Date:** Enter desired date.
19. **Competitor 2:** Who else do you have to compete with for this opp?
20. **Lead Source:** Where did this lead come from?

This image shows "Activity" field, which determines what will be in "Status."
"Status" can always be changed to "Needs Review" if the other options is not applicable at this time.



This image shows additional fields in this opportunity.

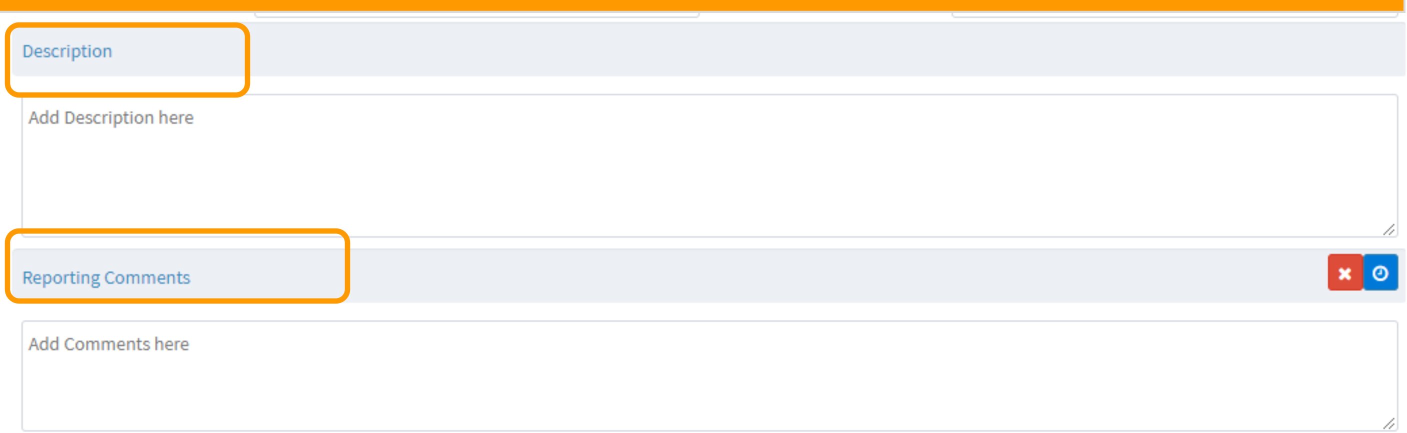


Description: Description will appear on the left in “cliff notes” area of the Repfabric screen and it will show in your email plugin at the bottom. It’s a brief description of the opportunity that could help your sales team (and inside reps) have a deeper understanding of what this opportunity is about. In other words, it could be about part ___ and the description could include “We are part of the design phase to reduce wattage, heat etc. This will be used in the 2022 model of ____.”

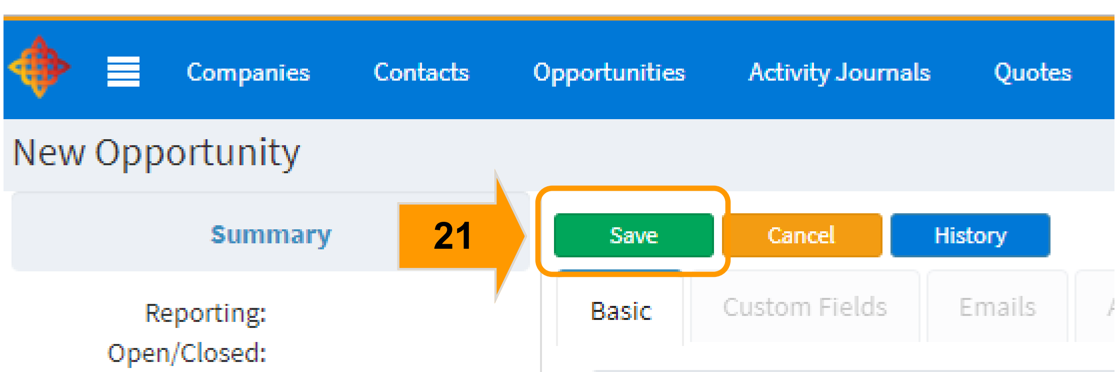
Reporting Comments: THESE COMMENTS CAN BE REPORTED. Think of this area as a way to help your line get a feel for what’s happening on this deal. An example could be “competitive pricing should be under $___ per unit” or “___ part failed, looking for another solution.” These comments remain in place until they are revised. IF the language is nondescript it can be kept month after month. There is also a date button so you can add a date-specific comment like “new engineer on board likes ___ part.”

21. Left click “Save” button.

This image shows the “Description” and “Reporting Comments” sections.



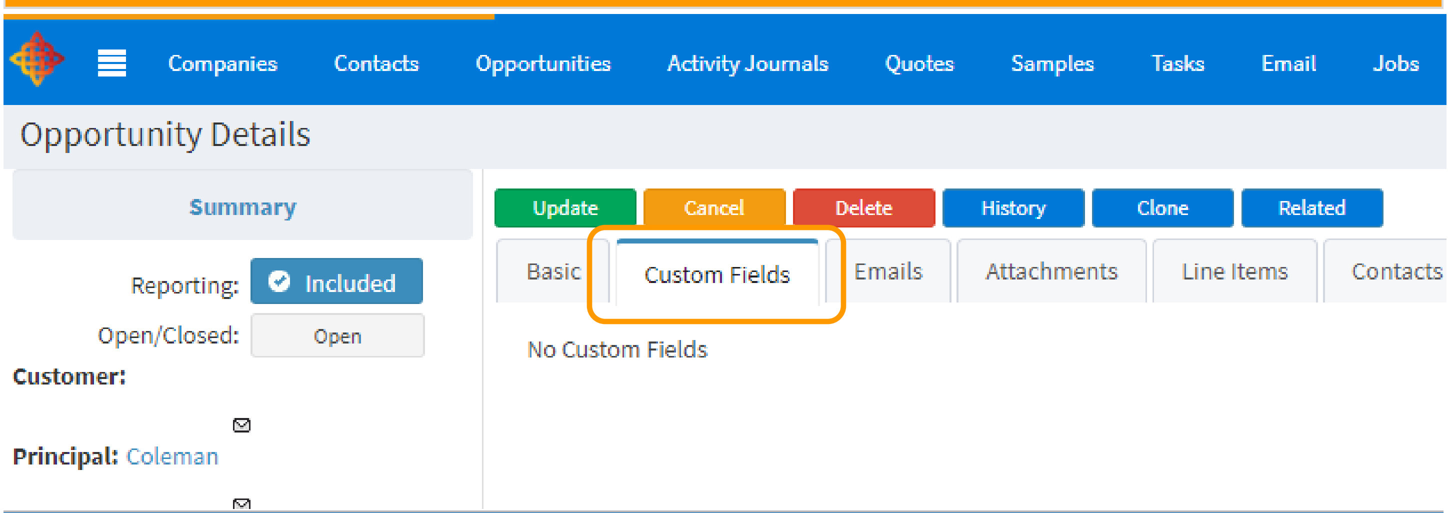
This image shows the “Save” button at the top of the Opportunity. You must save before entering any additional information.

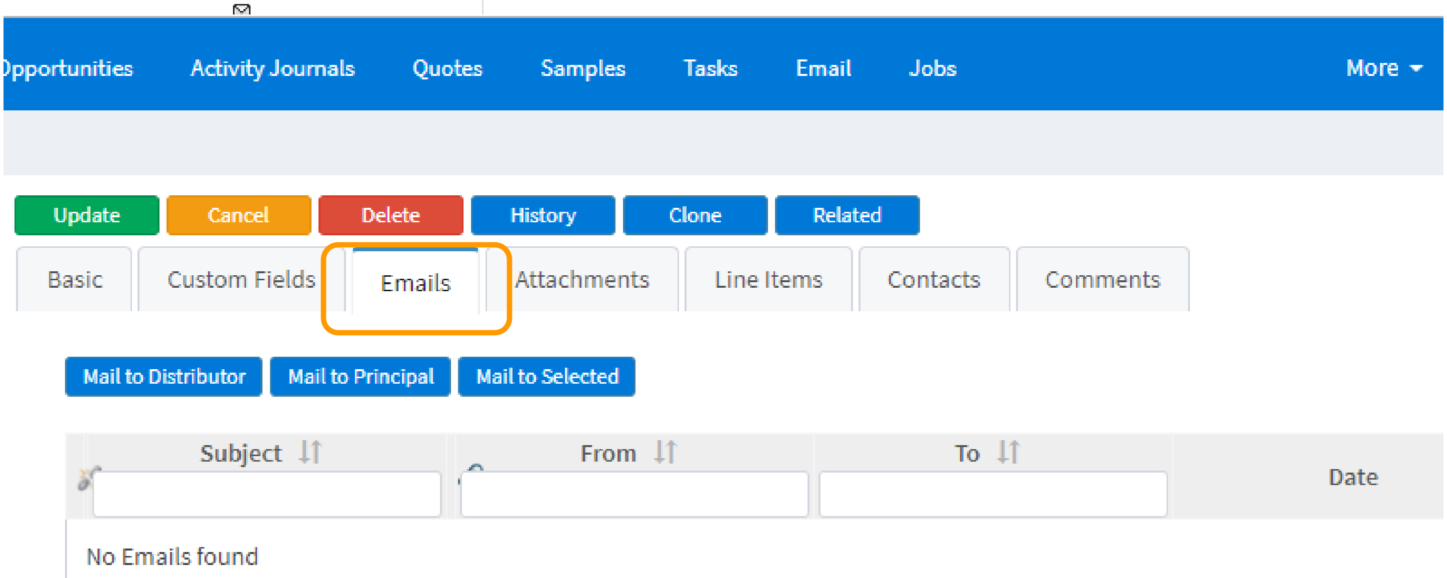


Custom
This tab is for fields that are not currently available by default. Some customers use this for specific manufacturer fields that will be exported or, in some cases, if the shipping information differs from the customer’s office location. To edit this section, go to Home > Set Up > Configuration Settings > Custom, then add and organize anything needed.

Emails
Anyone on your sales team, who has access to your opportunities can click on this tab and read through the recent emails between you and the customer or manufacturer. Repfabric is highly attuned to catching the emails and filing them with the right opportunity. For complete accuracy, send the first email from inside the opportunity in Repfabric, then the intelligent system has a higher chance of discerning which email goes where. If an email fails to get logged to the right opportunity for any reason, that can be logged from the plugin or from the email area in Repfabric.

These images show the “Custom” and “Emails” tabs in an Opportunity.





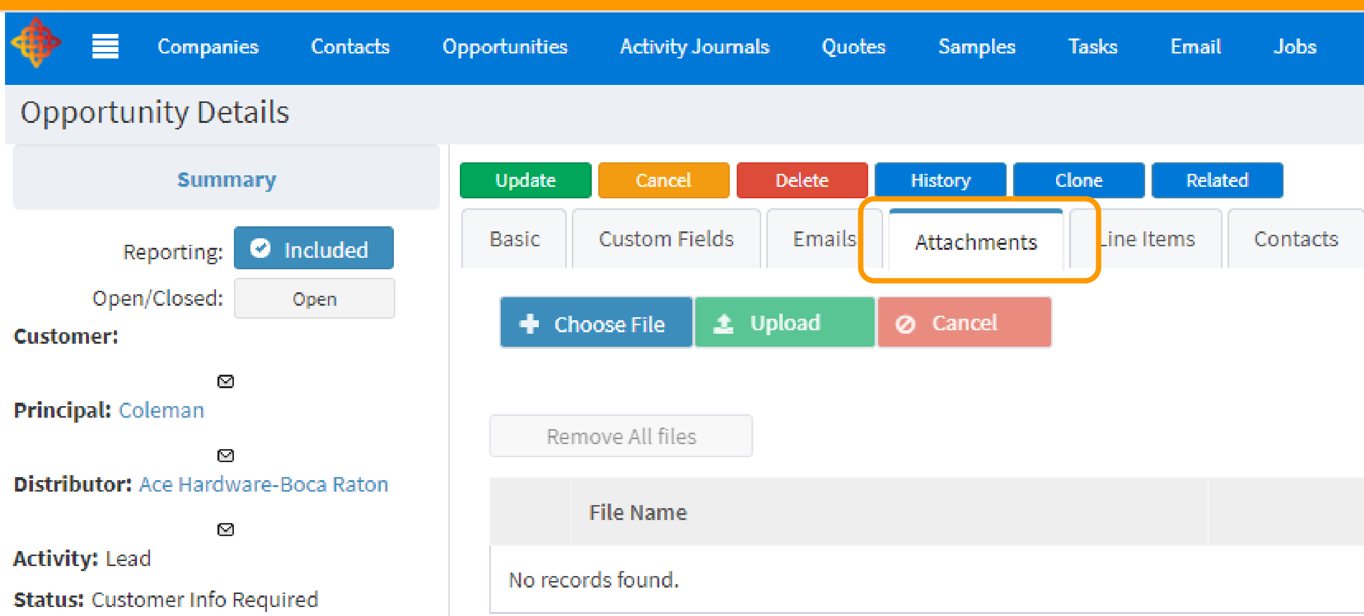
Attachments

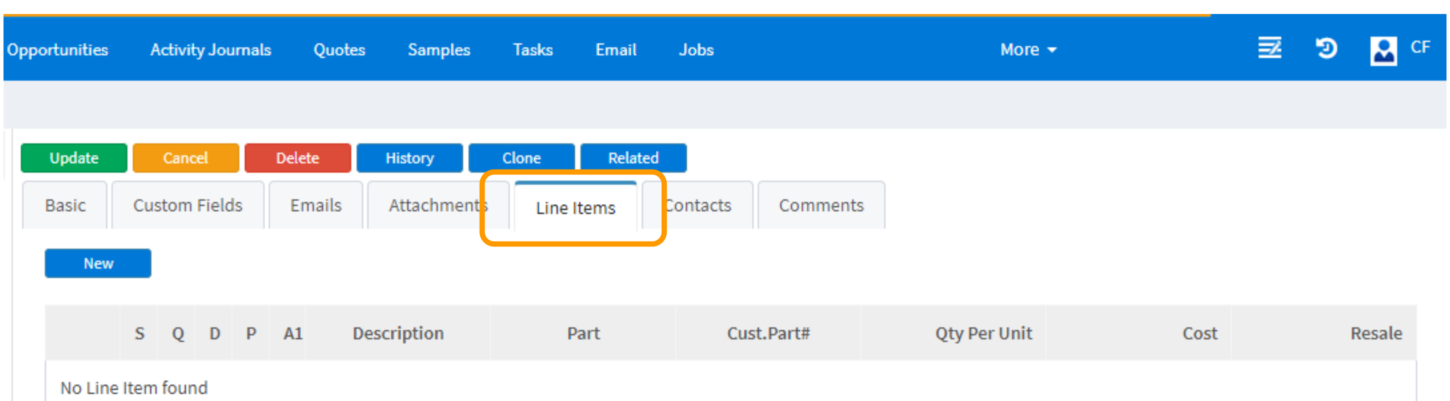
In order to attach a file it is a TWO STEP process. First, select the file and find it on your computer. Second, hit 'upload.' HINT: rename the file before you upload it so when you look at it later instead of it saying "scan01" it says something helpful like "pump image – internal" or "switch configuration." Repfabric does not let you click it to view it. Once it's uploaded, you'll have to download it to your phone or computer to look at it again.
There are two places in Repfabric to store attachments. One is here in the opportunity and the other is at the company record. HINT: make sure your team has an agreement of what type of files go where so you avoid the "I swear I put it there" conversation. It can happen when one person looks at the opportunity attachments tab and the other person is looking at the company record attachments tab. A dealer or rebate agreement, an NDA ,or annual parts list could go to the company record while specific drawings related to this opportunity would go to the opportunity record.

Line items

This is where you can specify the part numbers associated with this opportunity. It is helpful to include this detail because it allows you to share specifics with your line for what products will be ordered, and part numbers successfully specified can be compared against orders and commissions received (so make sure you got paid on the "win").

These images show the "Attachments" and "Line Items" tabs in an Opportunity.

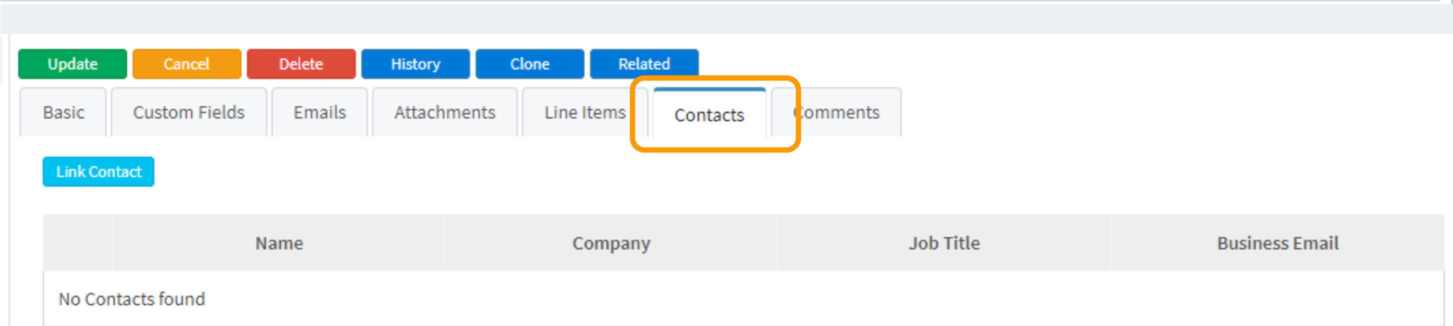


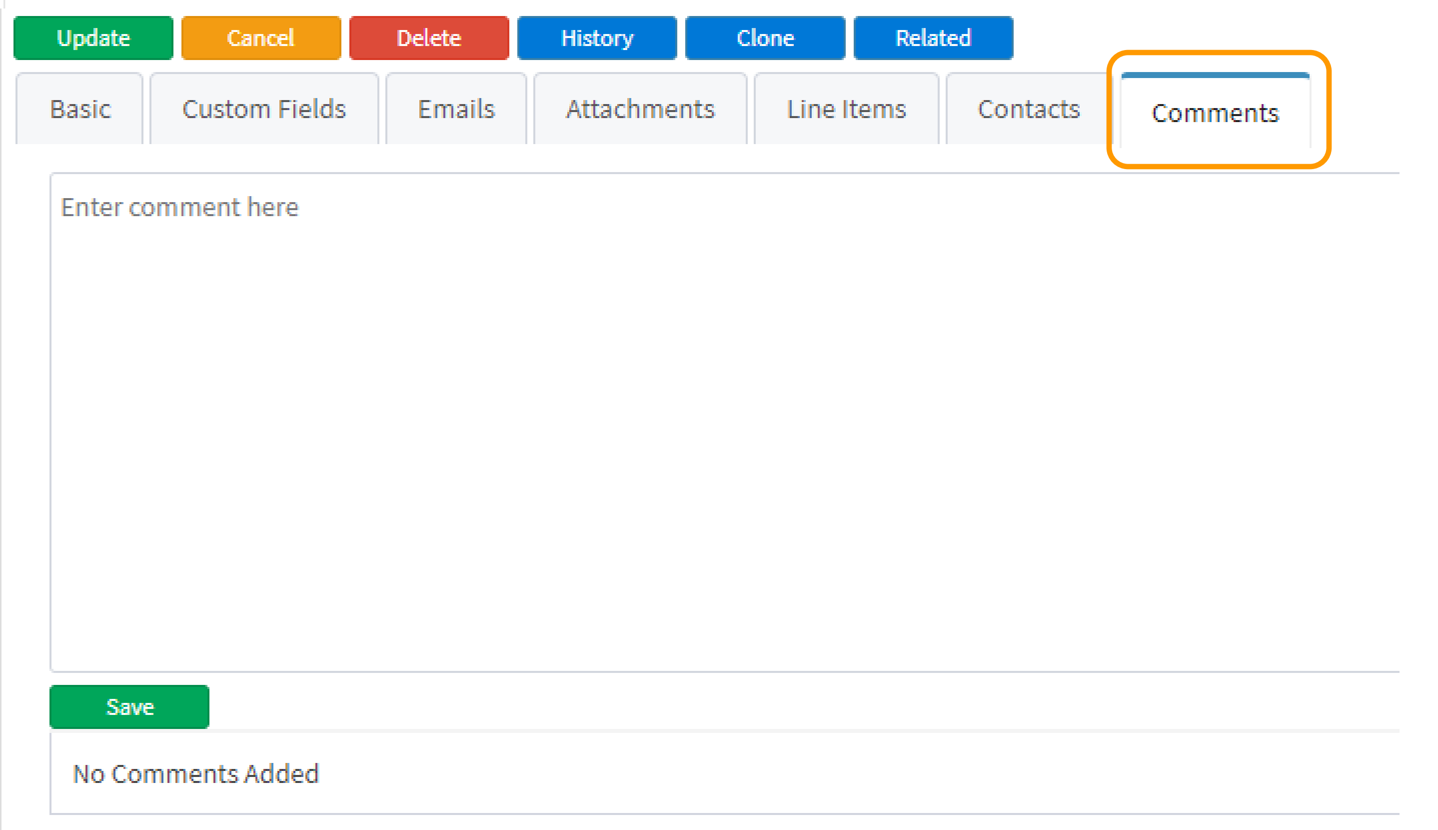


Contacts
There could be a dozen contacts listed on the company record. The one marked primary in the company record will automatically be associated with the opportunity. You can click “link contact” to search for contacts already in Repfabric and add them to this list. If you click “add new contact” it will add an entirely new contact to your list of contacts for this opportunity.

Comments
There are three places to enter comments about an opportunity – this is the one place that is for internal use only. This section cannot be exported for reports like Reporting Comments can to prevent sharing internal discussion with your line. This also tracks comments in diary form. It keeps a running list of who said what. This is useful for inside and outside reps communicating to each other. “ISR, please request the quote today.” “OSR, quote done but they don’t have part ____, would the customer like ___ instead?” Think of this comment tab as a place where you can keep notes to yourself. With so many deals in the air, sometimes details can get lost. It could be captured here like, “remember to take sample ___ next time and demo how that could work his ___ project.

These images show the “Contacts” and “Comments” tabs in an Opportunity.



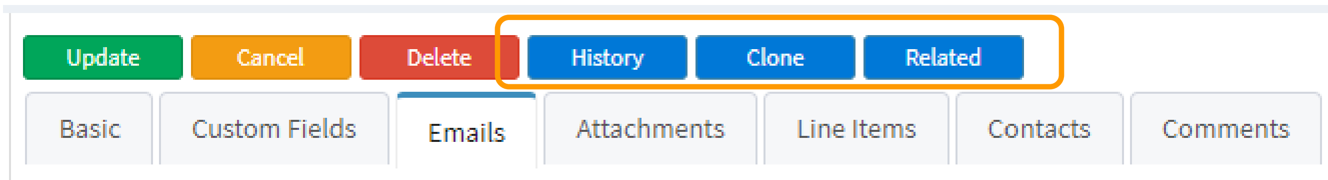


Related
If you have a contract manufacturer, architect, or another company working on this opportunity you can relate that company with the customer or manufacturer by using this button. This company affiliation is considered with jobs and commission reconciliation.

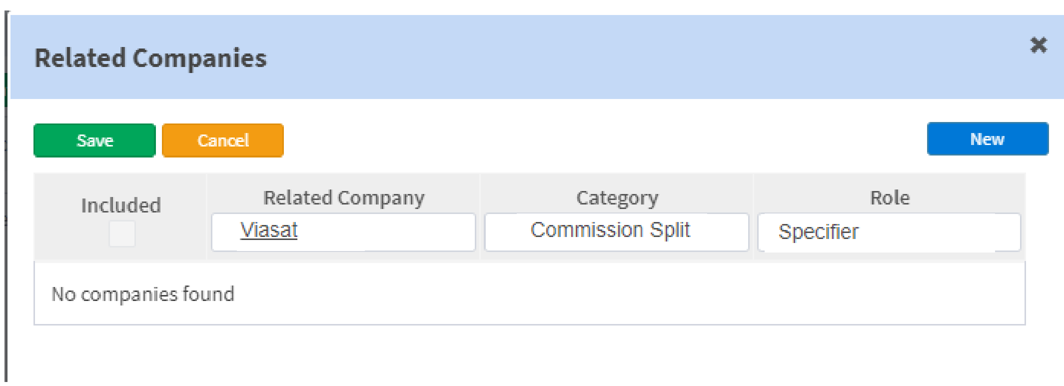
Clone
This button can be used to duplicate the common fields on a project basis when multiple manufacturers are involved (this multiple opportunities), each with its own “envelope (opportunity)” where emails are stored.

History
If at any point there is some concern on the level of activity for who did what on this opportunity, you can click “history” and see chronologically when this opportunity was progressed or edited.

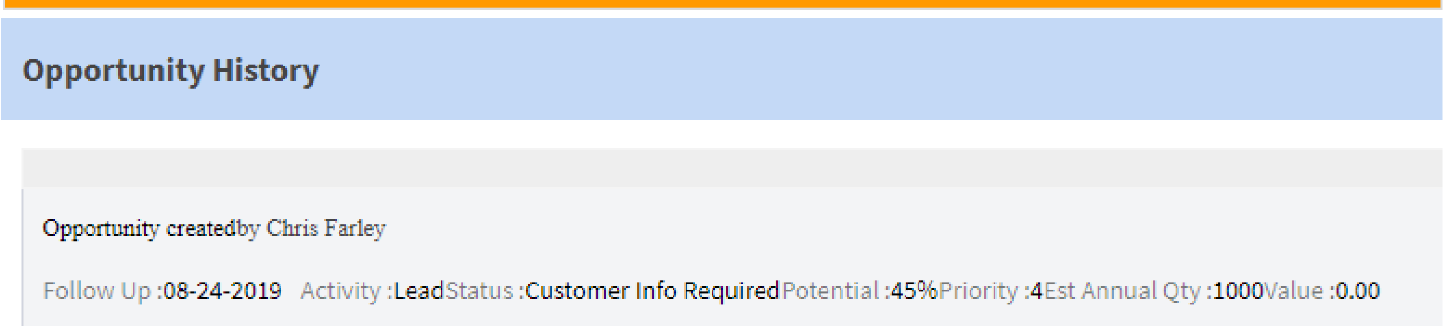
These images show the “Related”, “Clone” and “History” buttons in an Opportunity.



This image shows “Related” companies, which opens in a pop-up window.



This image shows the “History” of the opportunity.



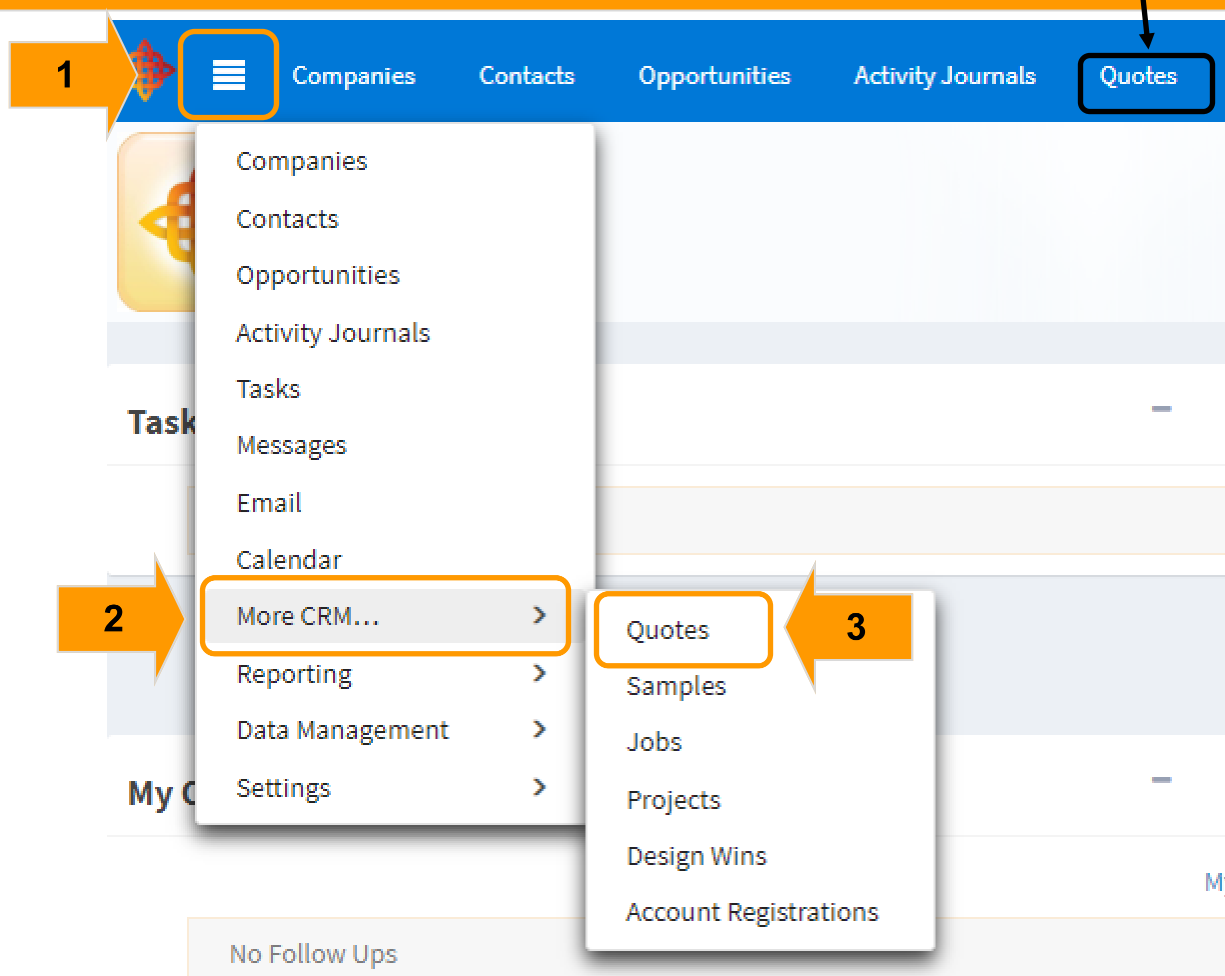
This concludes the instructions for this section.

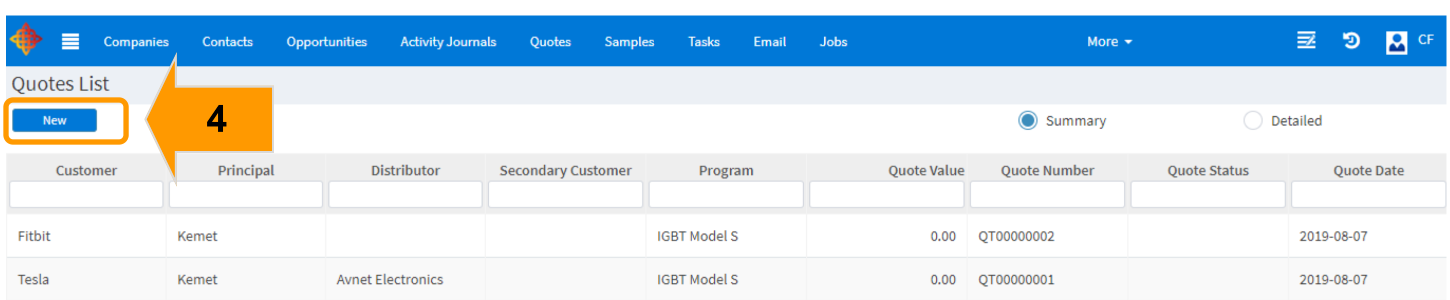
How to Prepare and Send a Quote

Quotes can be created using the “Copy into” function in the Line item tab of an Opportunity. A Repfabric quote can generate a PDF to print and/or send to the customer via e-mail. This shows you how to create a quote in Repfabric.

1. Left click menu icon.
2. Hover over “More CRM.”
3. Left click “Quotes.”
4. Left click “New.”

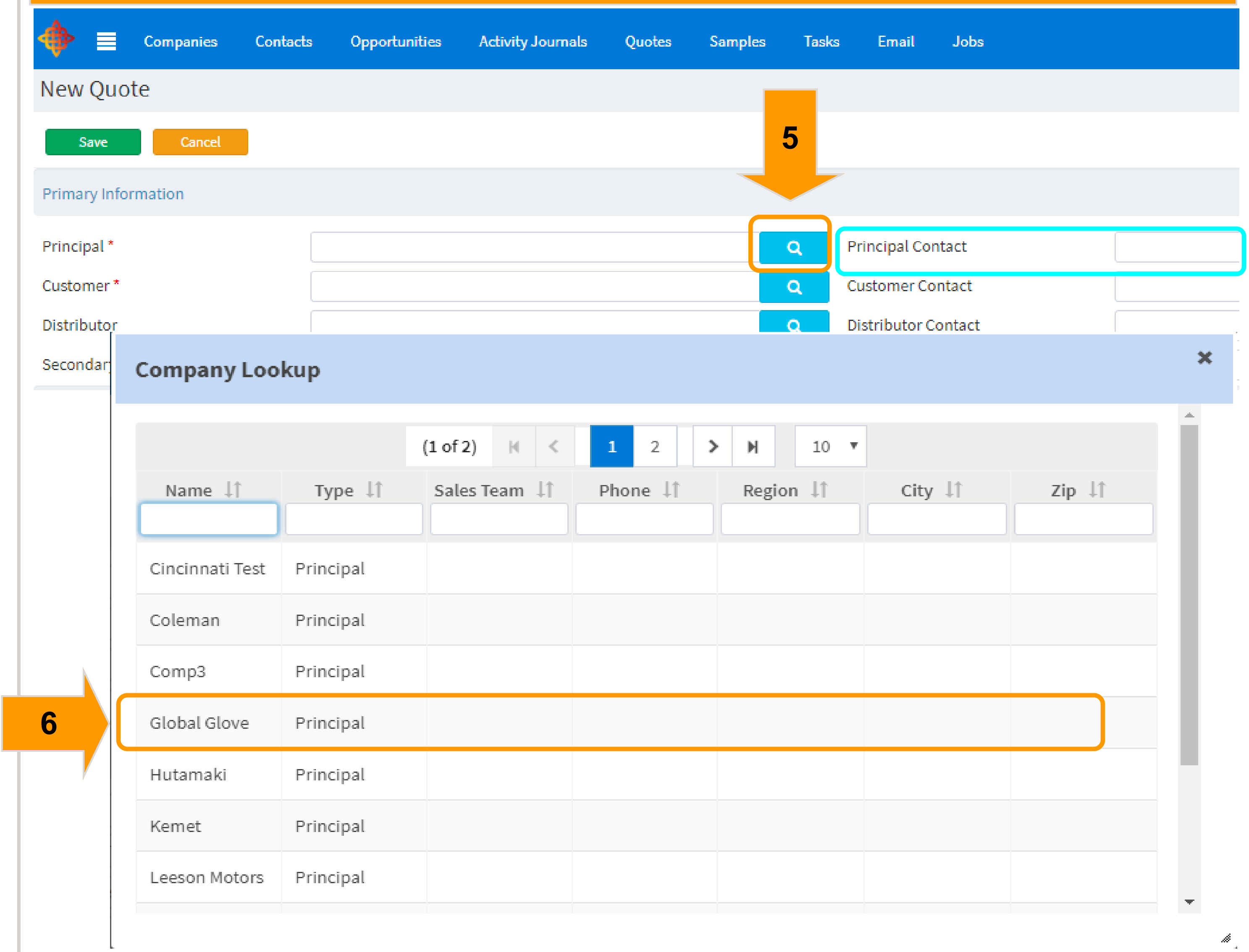
This image shows where to find “Quotes” in the traditional menu (if you have not added it as a shortcut)





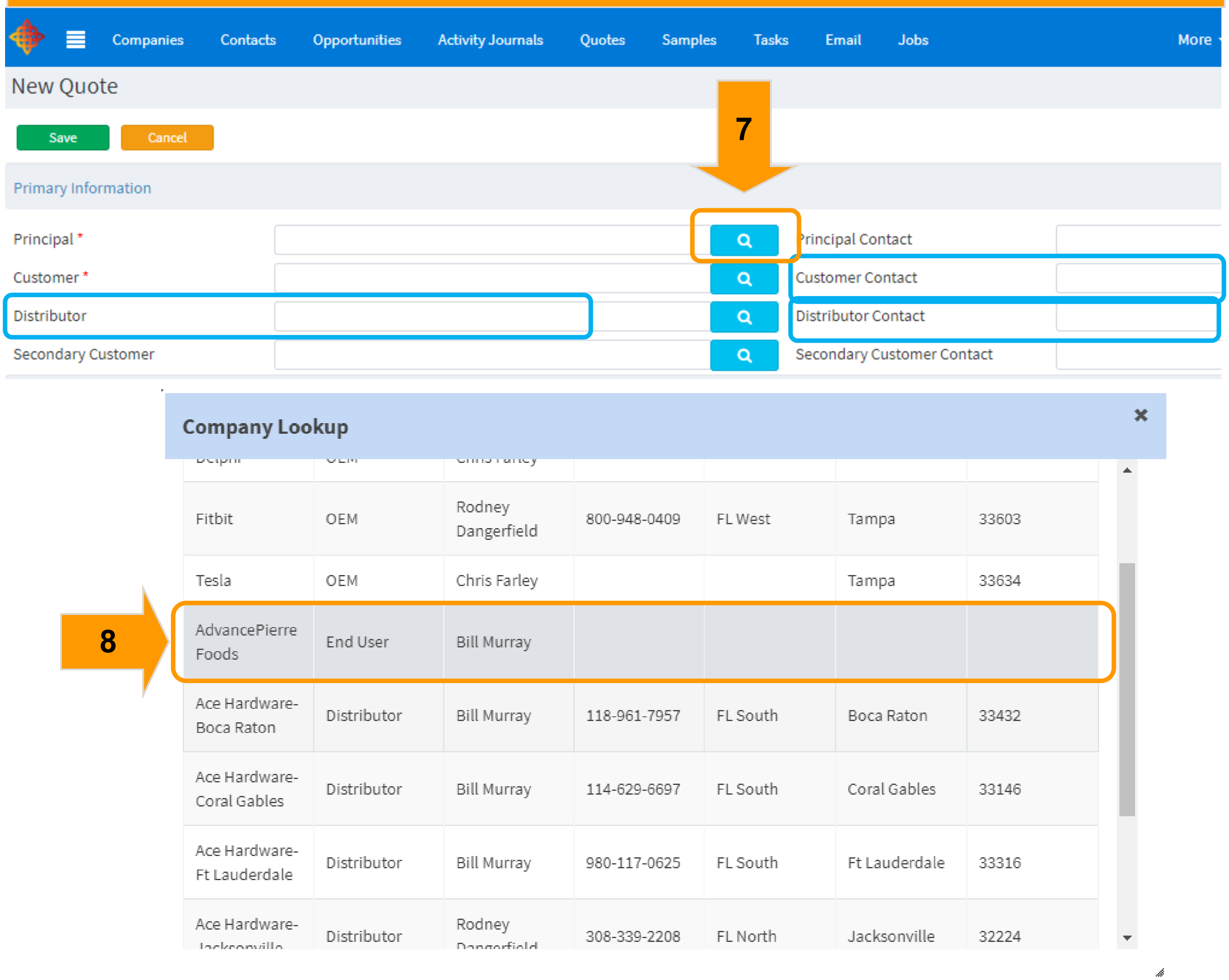
5. Left click magnifying glass to choose manufacturer from list.
6. Left click desired manufacturer.
   Optional– choose Manufacturer Contact

This image shows the magnifying glass and list of sample manufacturers.



7. Left click magnifying glass to choose customer from list.
8. Left click desired customer.
   Optional– choose "Customer Contact." (If there is a primary contact associated with the customer, the contact will auto-populate).
   Optional– choose "Distributor."
   Optional– choose "Distributor Contact."

This image shows the magnifying glass and list of sample customers.



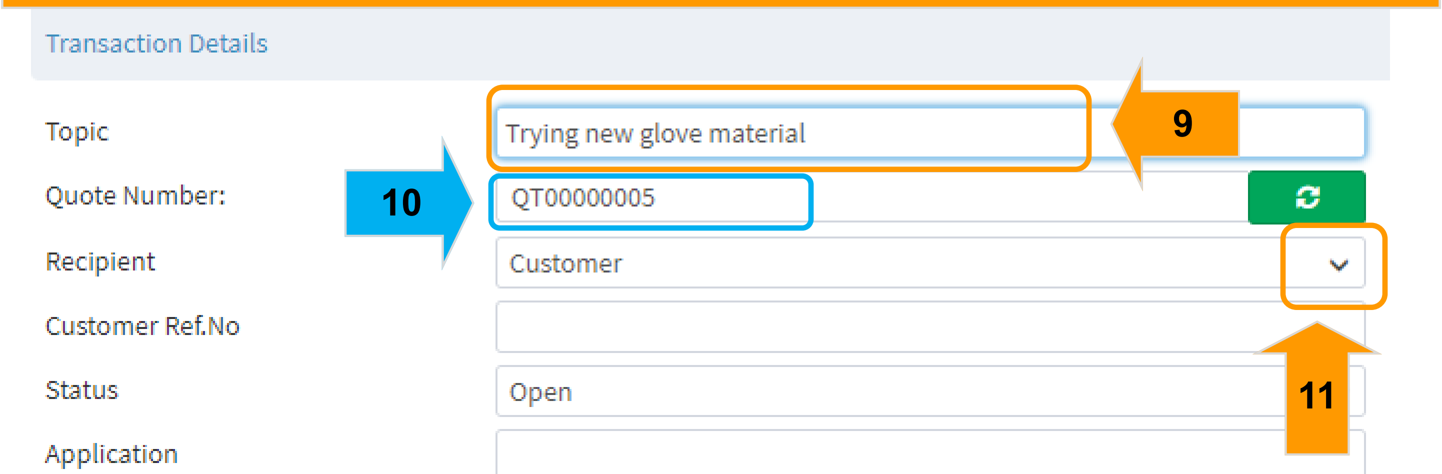
Some Repfabric users have a point -of-purchase or point-of-sale business model where the distributor can act like the end customer. If that is the case, the setting was adjusted in the configuration phase when the instance of Repfabric was set up for your company.

If your distributors are assigned a sales team, then you can use companies with a distributor type interchangeably, in either the customer field or the distributor tab. If you have one and not the other it's okay.

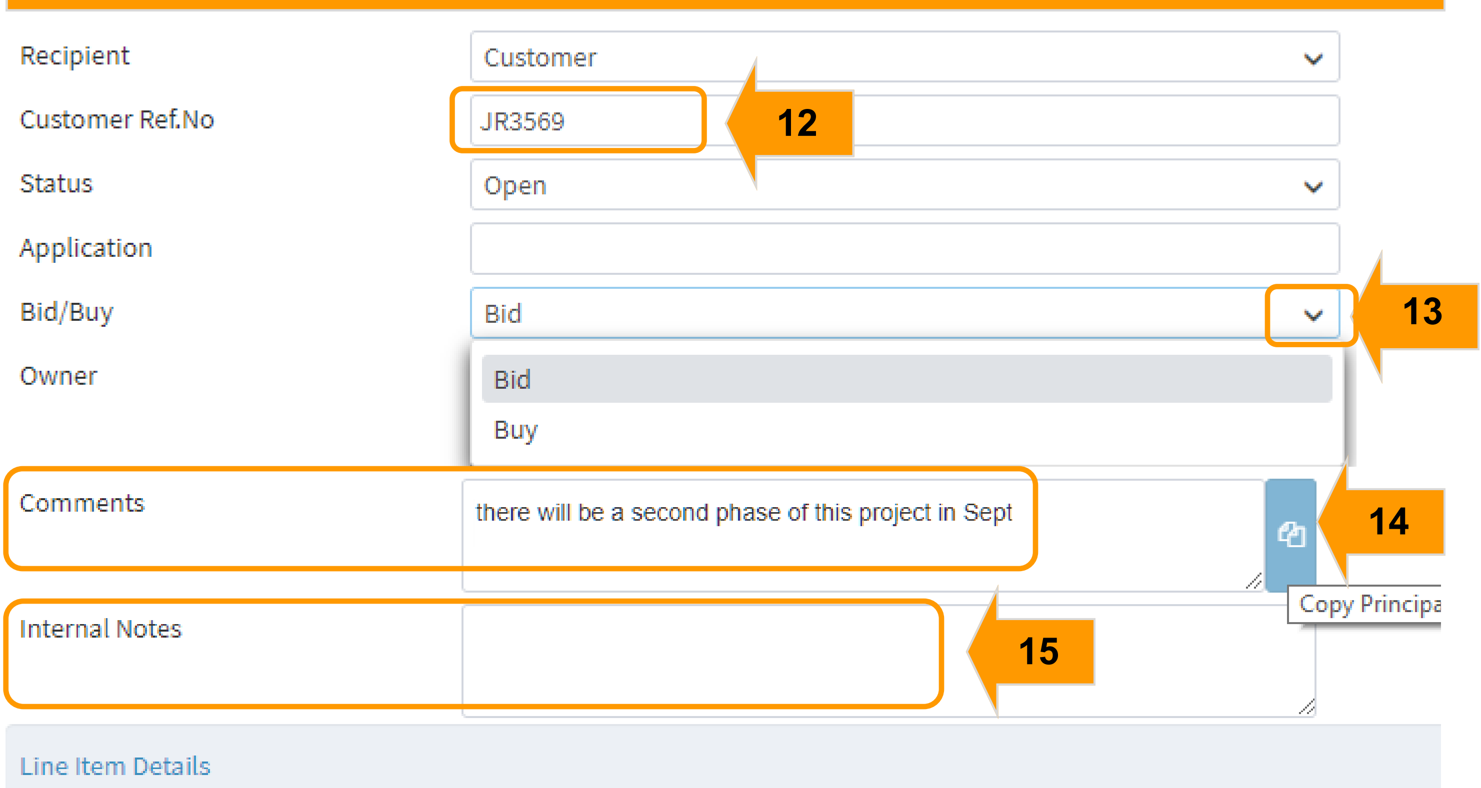
The minimum in a quote, if you are of the point-of-purchase business model, is a customer OR distributor AND a manufacturer. At a minimum for all opportunities is to designate a manufacturer (principal) and a customer if you are not a point-of-purchase business model.

9. Enter "Topic."
10. Quote number will be generated for you.
11. Customer is the default recipient, but you can use the drop-down for other options.
12. Enter "Customer Ref No." which is their RFQ typically.
    Optional- You can go back in later and edit quote to change status to "Closed" when applicable
13 Enter "Application."
    Optional– use "Bid" to "Buy" field.
14. Enter "Comments."
15. Enter "Internal Notes."

This image shows "Program", "Quote Number" and "Recipient" drop-down menu.

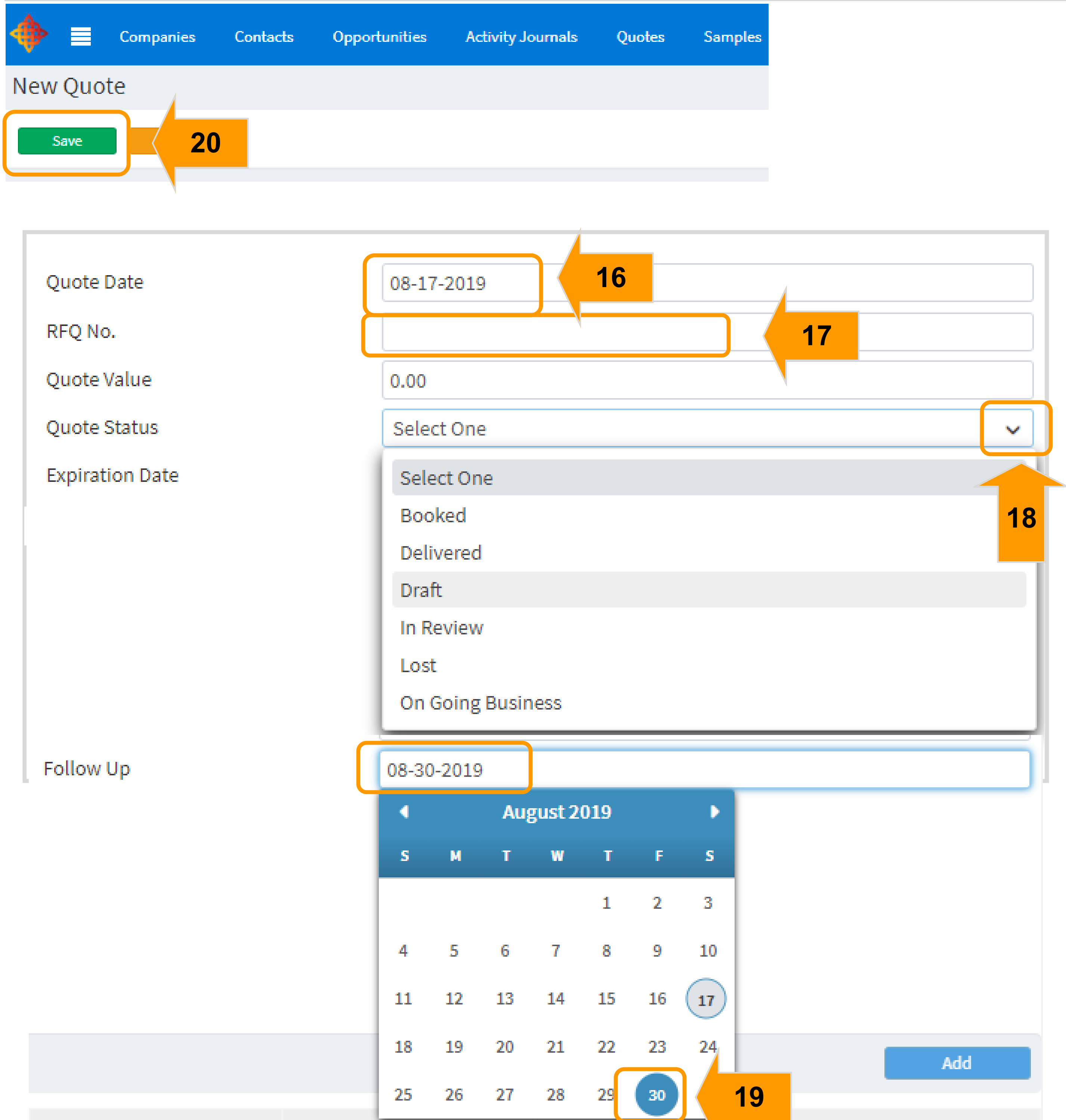


This image shows the two fields for comments and internal notes.



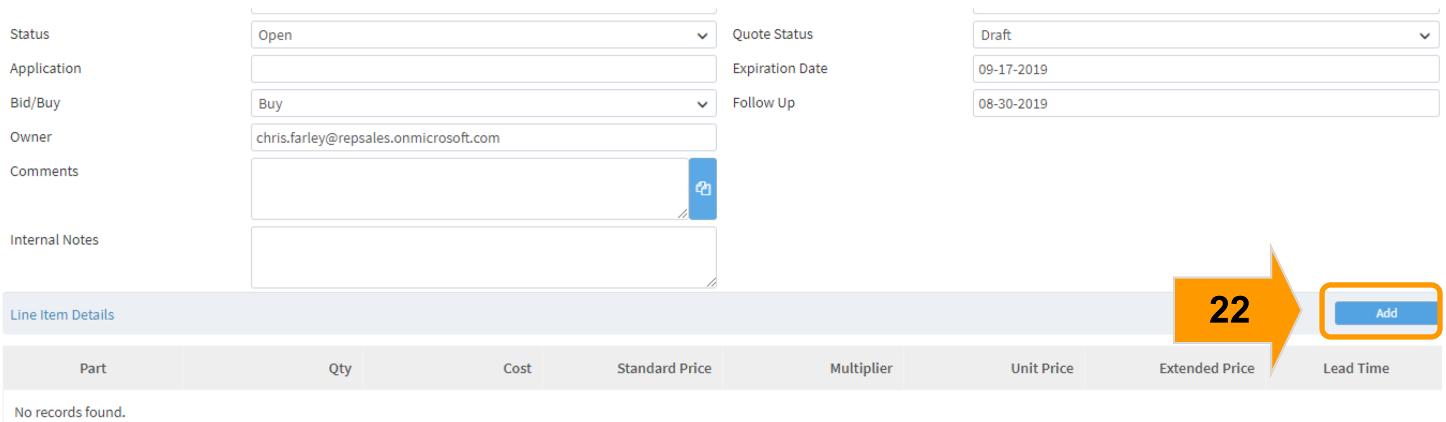
16. “Quote Date” will be filled in, but can be changed.
17. Enter “RFQ No.”
18. Use drop-down to choose “Quote Status” (by default it will be “Draft”, but you can go back and edit the quote after it has been “Delivered” to the customer or is “In Review.”)
19. Left click inside “Follow Up” field and chose date.
20. Left click “Save” before adding line items.

This image shows “Quote Date”, “RFQ No”, and “Quote Status” fields.

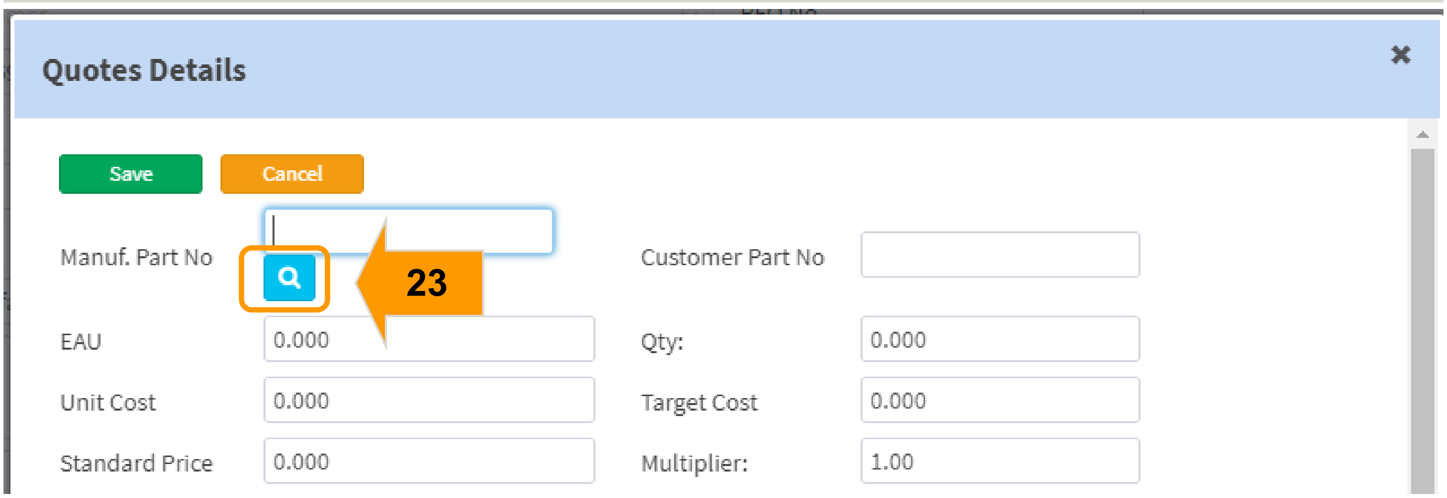


22. Left click "Add" to enter line items for the quote (before you save the first page of the quote, the "Add" button will be greyed out).
23. Left click magnifying glass to search for "Manuf. Part No." (You can also manually enter a part number and description or search for a desired part number.
24. Left click desired part number.

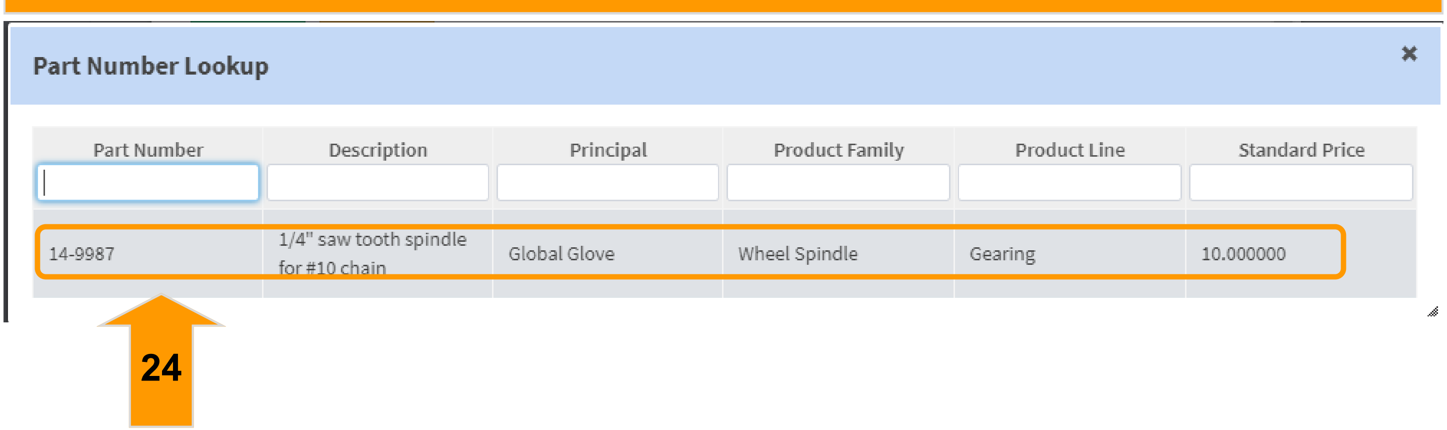
This image shows the "Add" button that is no longer greyed out.



This image shows where to find the magnifying glass to search for part numbers.



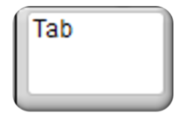
This image shows the pop-up to look up and choose part numbers.



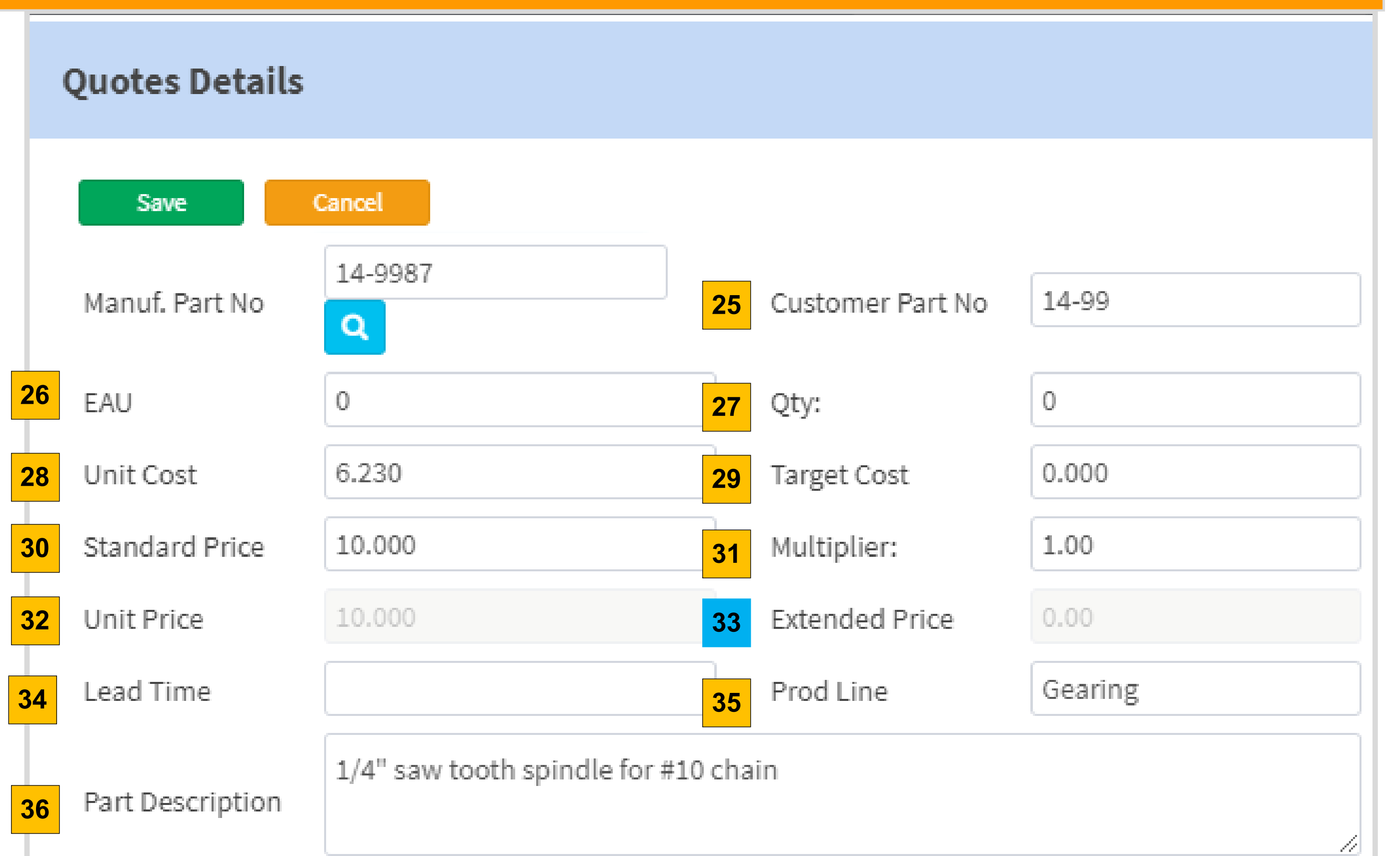
26. Enter "EAU" (Est annual units).
28. Enter "Unit Cost" (if it is different).
30. Enter "Standard Price." OPTIONAL
32. Enter "Unit Price."
34. Enter "Lead Time."
36. Enter "Part Description." OPTIONAL

25. Enter "Customer Part No." OPTIONAL
27. Enter "Qty" (if different from Est).
29. Enter "Target Cost." OPTIONAL
31. Enter "Multiplier." OPTIONAL
33. Will auto populate
35. Enter "Prod Line." OPTIONAL

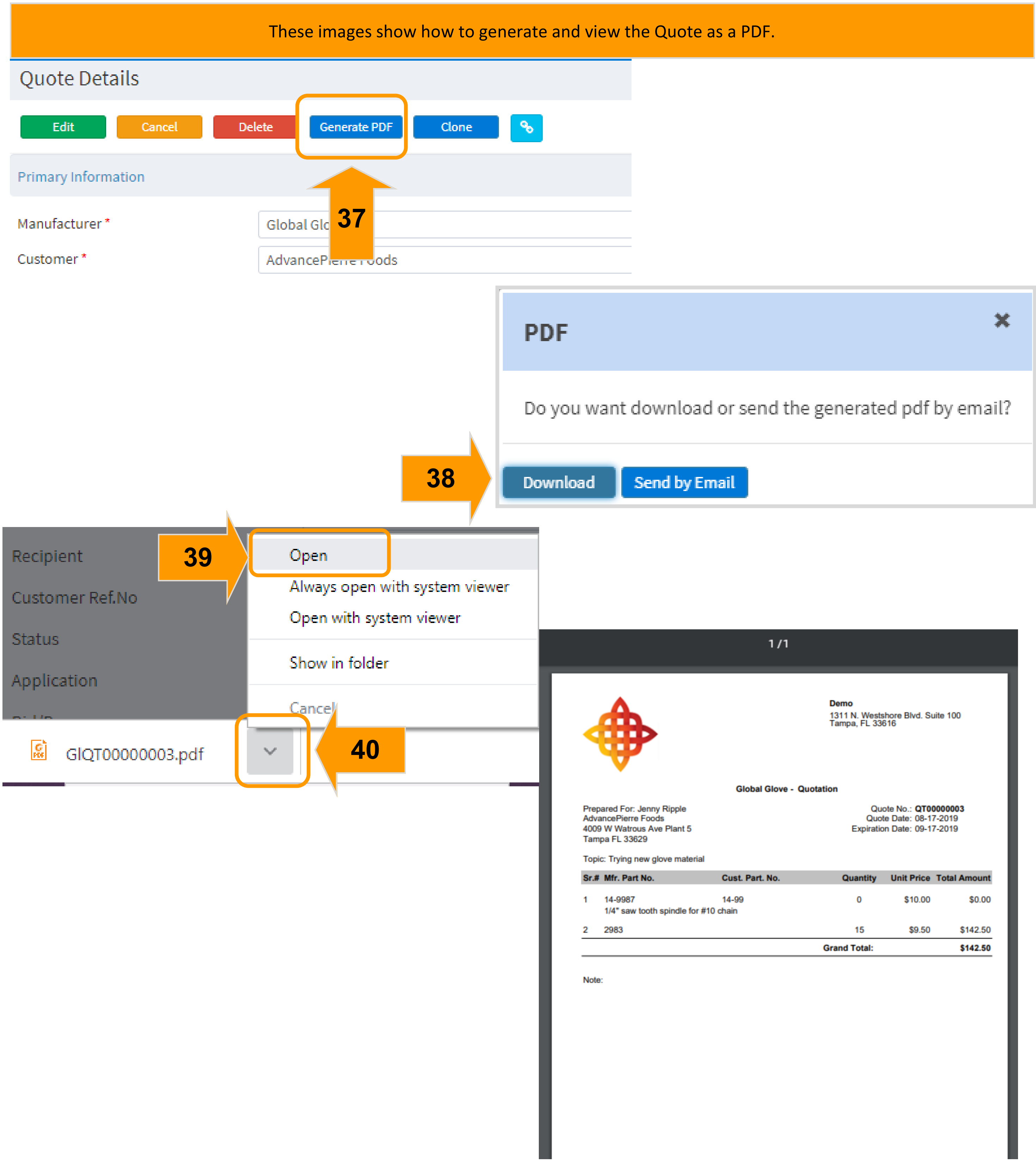
Use the TAB key to advance to the next field after each entry.



This image shows all the fields available for each line item on the quote.



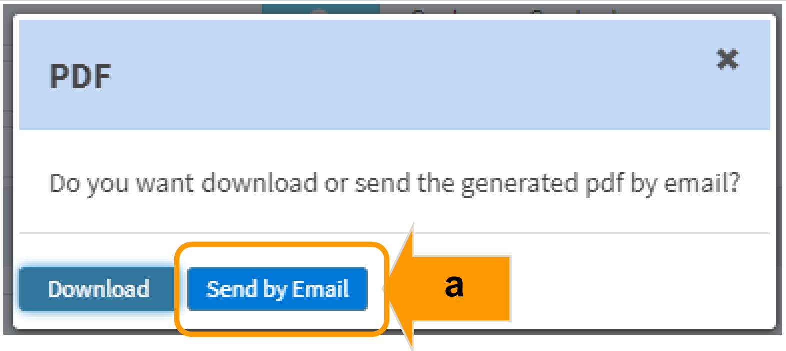
36. Left click “Generate PDF” button.
37. Left click “Download” (skip to page 93 to see instructions for emailing the quote).
39. Left click arrow on the download (bottom left corner of the screen).
40. Left click “Open.”

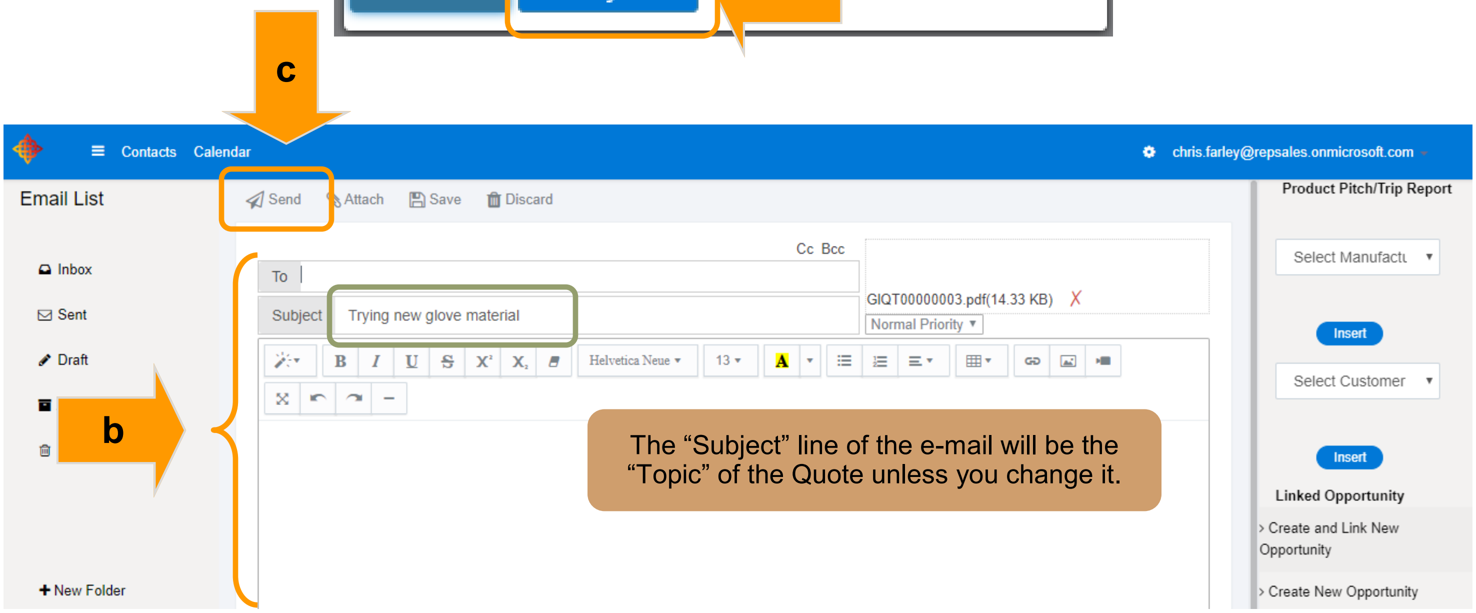


How to send Quote by Email:

a. Left click “Send by Email.”
b. Fill out the email fields.
c. Left click “Send.”

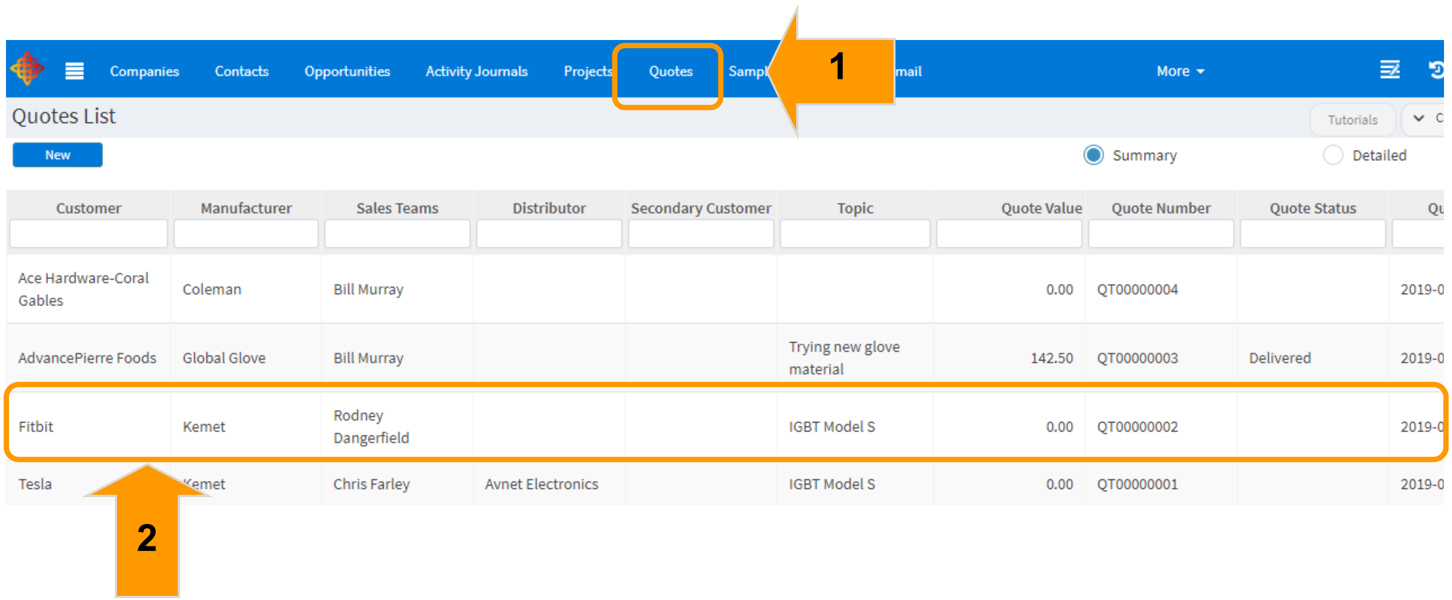
These images show the email that is created with the quote attached as a PDF.

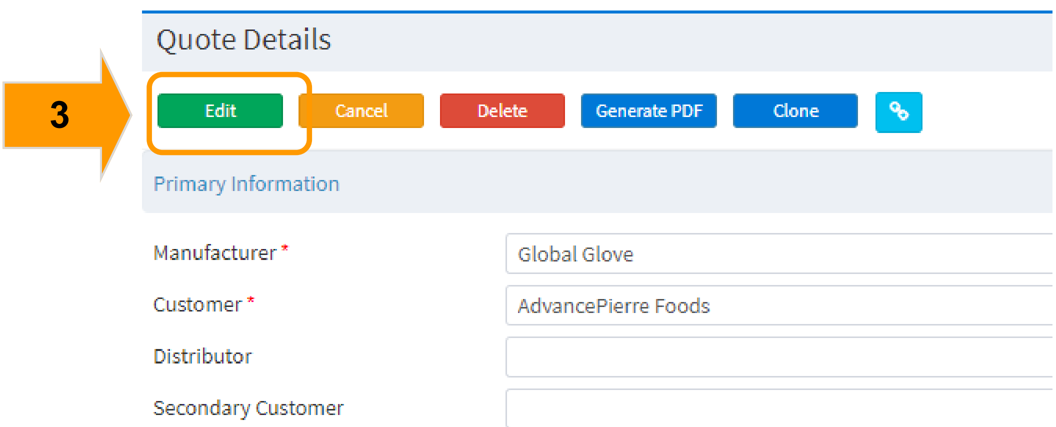




How to Find & Edit Quotes:

1. Left click "Quotes" menu.
2. Left click desired quote
3. Left click "Edit" button.





In addition to creating a quote under inquiries, it can also be created directly from an opportunity using the line items tab. Here are a few video tutorials you can watch.

- How to create a sample: https://tinyurl.com/Inquiries-create-sample
- How to create a quote: https://tinyurl.com/Inquiries-create-quote
- How you can delete a quote: https://tinyurl.com/Inquiries-delete-quote
- Inquiries - enable tracking of quotes https://tinyurl.com/RF-enable-quote-tracking
- Add your company logo and address: https://tinyurl.com/Inquiries-add-logo
- In Opportunities, how can you get a prompt and quick link to create the quote right there? https://tinyurl.com/RF-prompt-quote

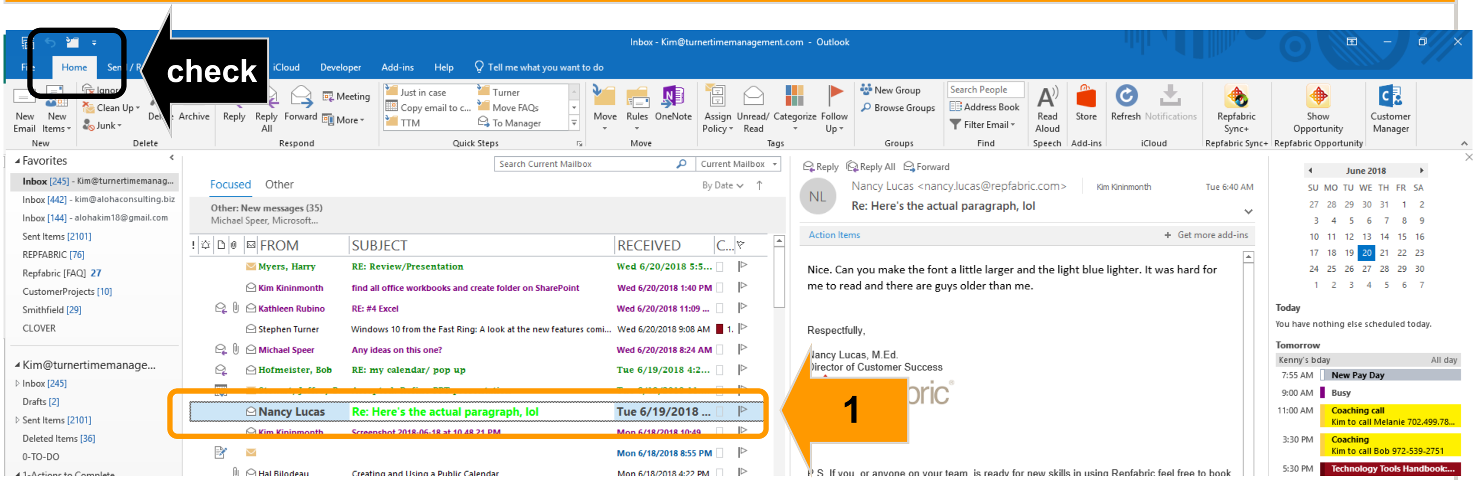
This concludes the instructions for this section.

How to Open Sync+ Window in Outlook Desktop

To access Sync+ in Outlook, you will have to OPEN an email to full screen, if you are not using the “Reading Pane.” If you select an e-mail from the contact or company that you are going to create or update an opportunity for, it will auto-populate in Sync+.

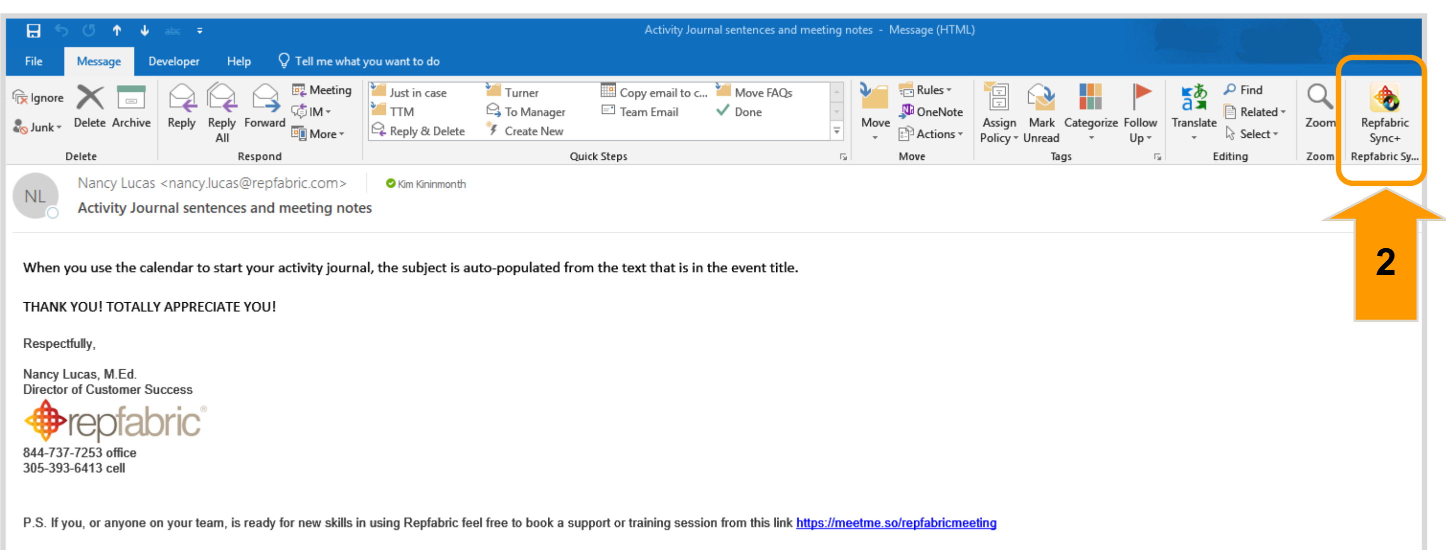
1. Double left click on desired e-mail.
2. Left click “Repfabric Sync+” button.

This image shows a selected e-mail in the sample Inbox. Double left click to open.
At the top you can see “Home” tab & the Repfabric Sync+ button you will see while viewing Inbox (or other folder).



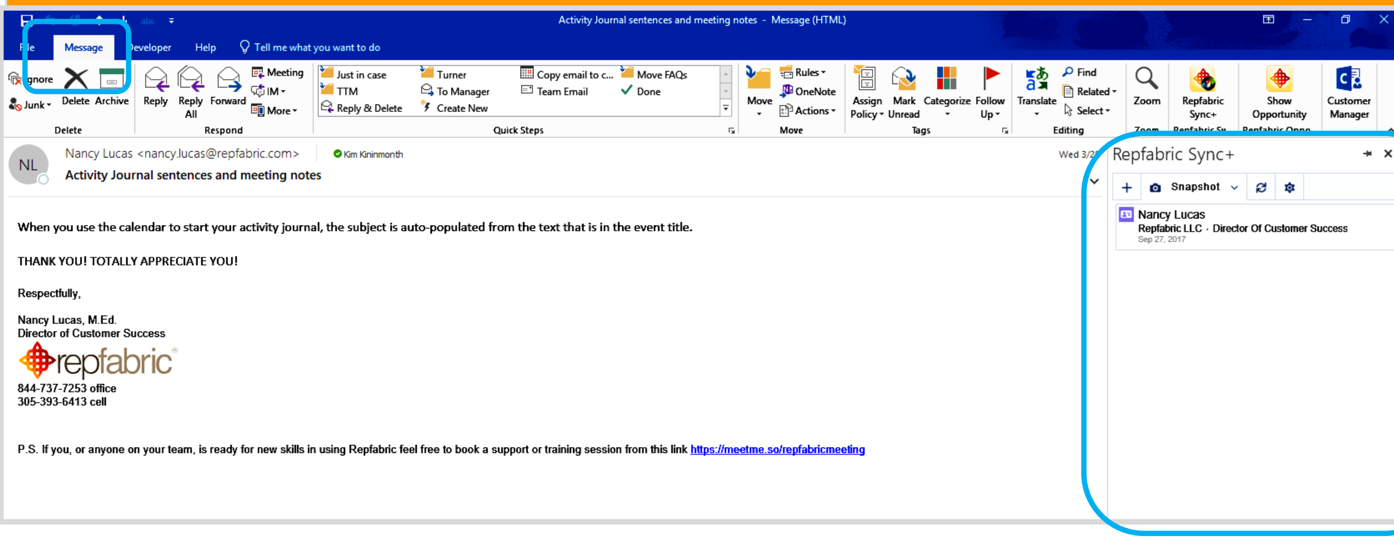
In order for the Repfabric add-in icons to show
Make sure you have the “Home” tab selected,
Before you open an email.
If it still does not appear, please send a screenshot to support@repfabric.com so we can help you.

This image shows the Repfabric Sync+ button in an **open** sample e-mail.



Make sure the "Message" tab is selected, this is the only place the "Repfabric Sync+" will appear.
At this point you can create a new contact, new opportunity, or update an opportunity.

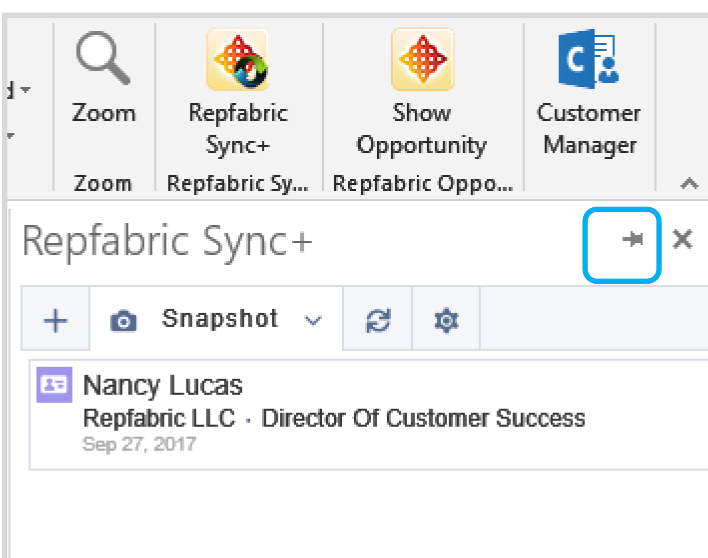
This image shows the Repfabric Sync+ pane open in a sample e-mail.



This image is enlarged to show the Repfabric Sync+ pane.

Here you can see that the window opens to Snapshot. This shows any people or opportunities Repfabric has identified as related to this email.

- People will show as purple business cards if they are already a contact in Repfabric or a green square with a white plus sign inviting you to add them as a contact.
- Opportunities will show with gold crowns as their icon.



Press the "push pin" icon so that it points down to keep the Repfabric Sync + Window open as you move from email to email.

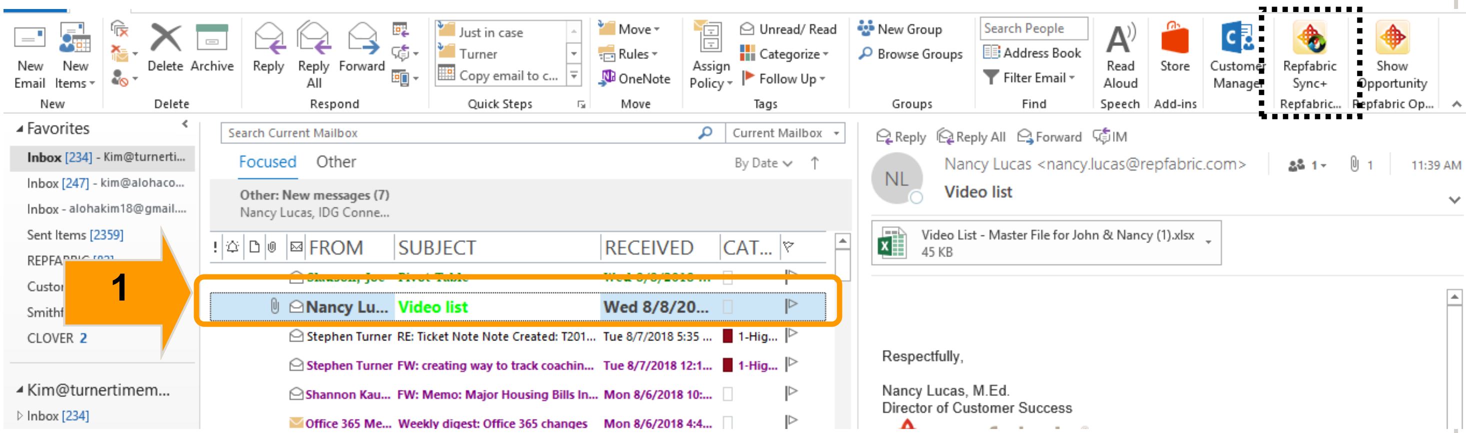
This concludes the instructions for this section.

How to Create an Opportunity in Sync+ in Outlook Desktop

To access Sync+ in Outlook, use the 'Reading Pane' or OPEN an e-mail to full screen. This process is the same as creating an Opportunity in Outlook online.

1. Left click on desired e-mail.
2. Left click "Repfabric Sync+" button.

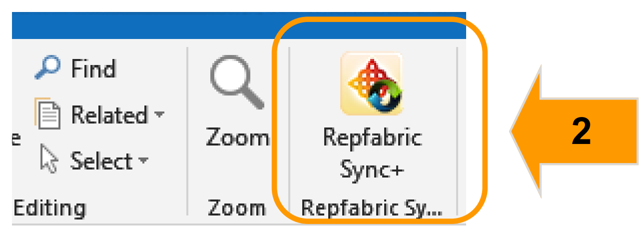
This image shows a selected e-mail in the sample Inbox. Double left click to open.



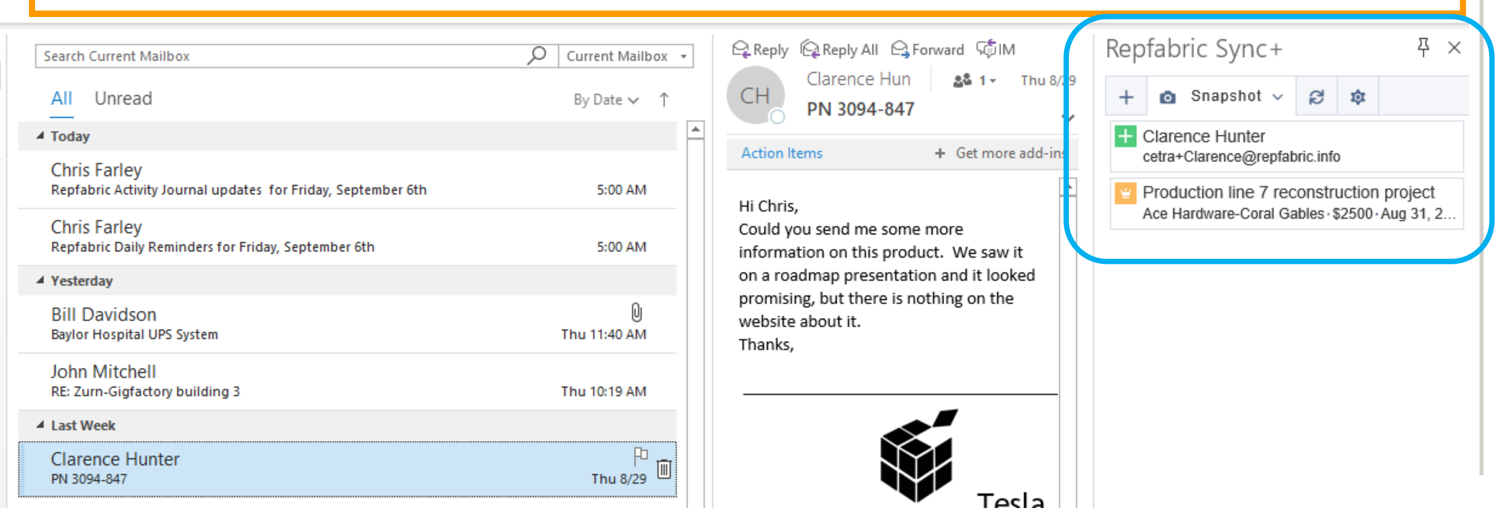
This image is enlarged to show the Repfabric Sync+ button.

Start with an e-mail relevant to the opportunity you want to create.

Based on names in the To, Cc, Bcc fields, Repfabric may auto select the customer and/or principal.

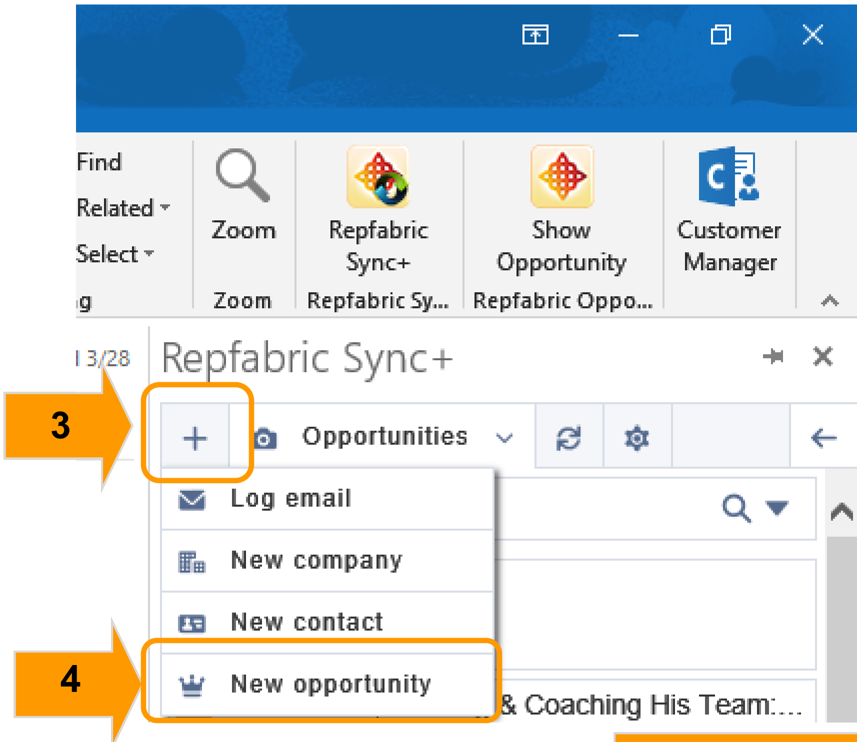


All contacts and opportunities associated with this principal are shown in the Sync+ pane.
Purple = a contact that is in Repfabric. Green=a contact this is not in Repfabric.
Gold crown = an opportunity associated with this email

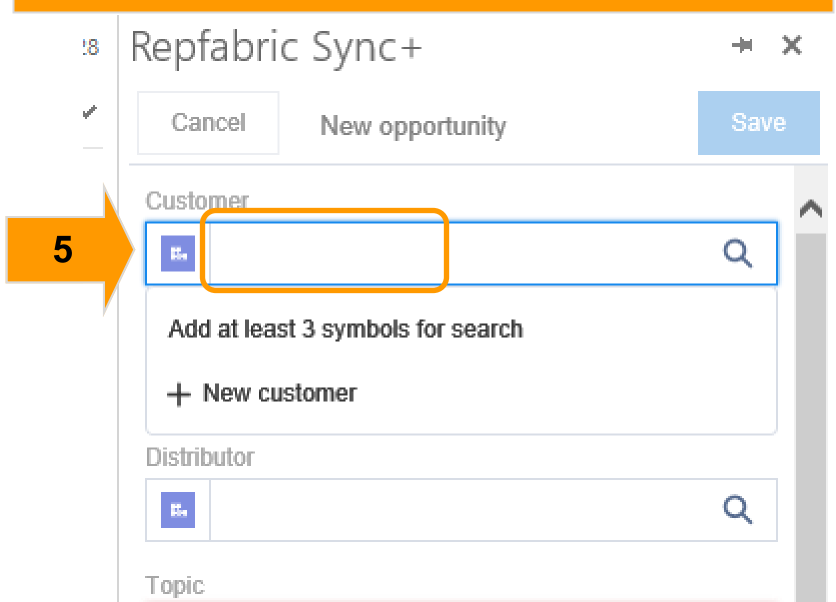


3. Left click + sign.
4. Left click “New Opportunity.”
5. Left click “+ New customer” (or begin typing inside “Customer” field to search for an existing customer).

This image shows where to find the “Add” button and “New Opportunity.”



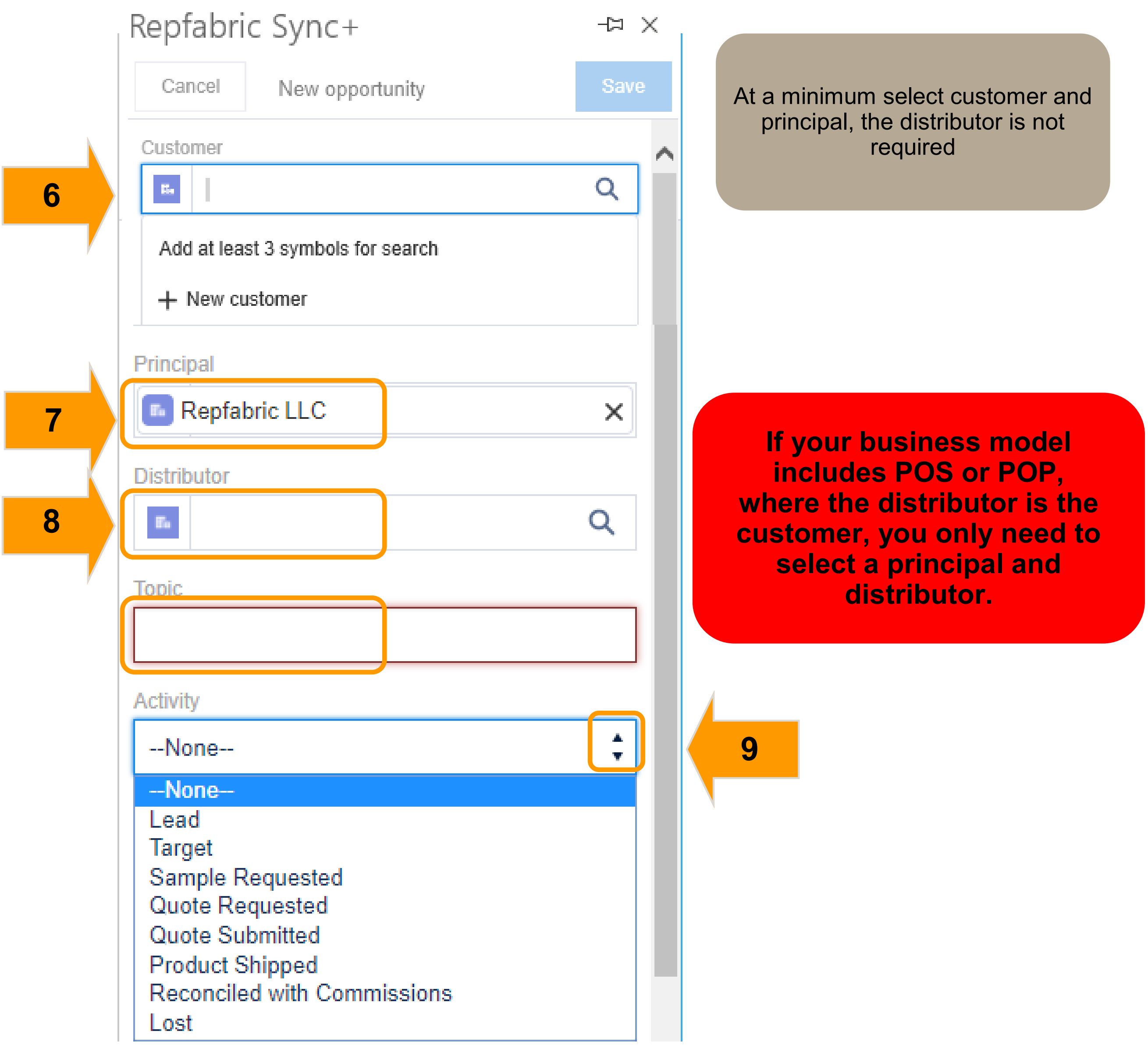
This image shows the “Customer” field.



Use the TAB key to advance to next field.

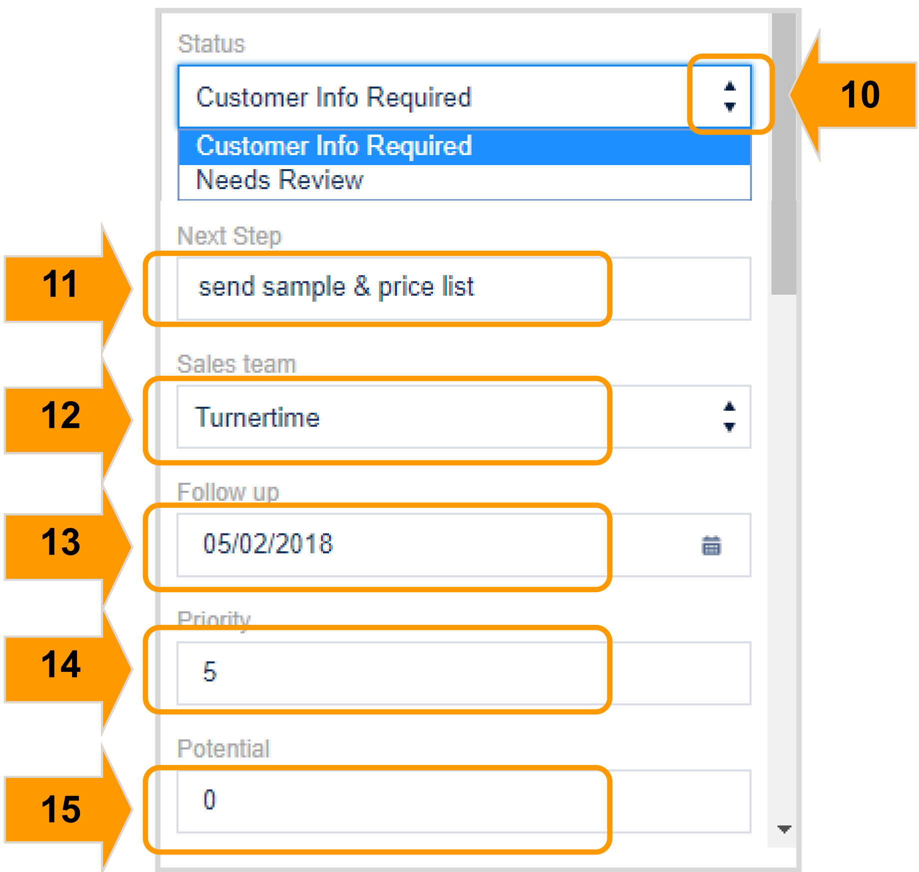
6. Type the principal/manufacturer/product line (if its not already populated).
7. Type distributor (optional).
8. Type a "Topic" (i.e. the type and/or name of the product they want).
9. Left click the drop-down arrow to select an activity.

This image shows the drop-down selections for "Activity." You can use the TAB key to advance to the next field.
To search for customer, principal, or distributor, type at least three characters in the field.



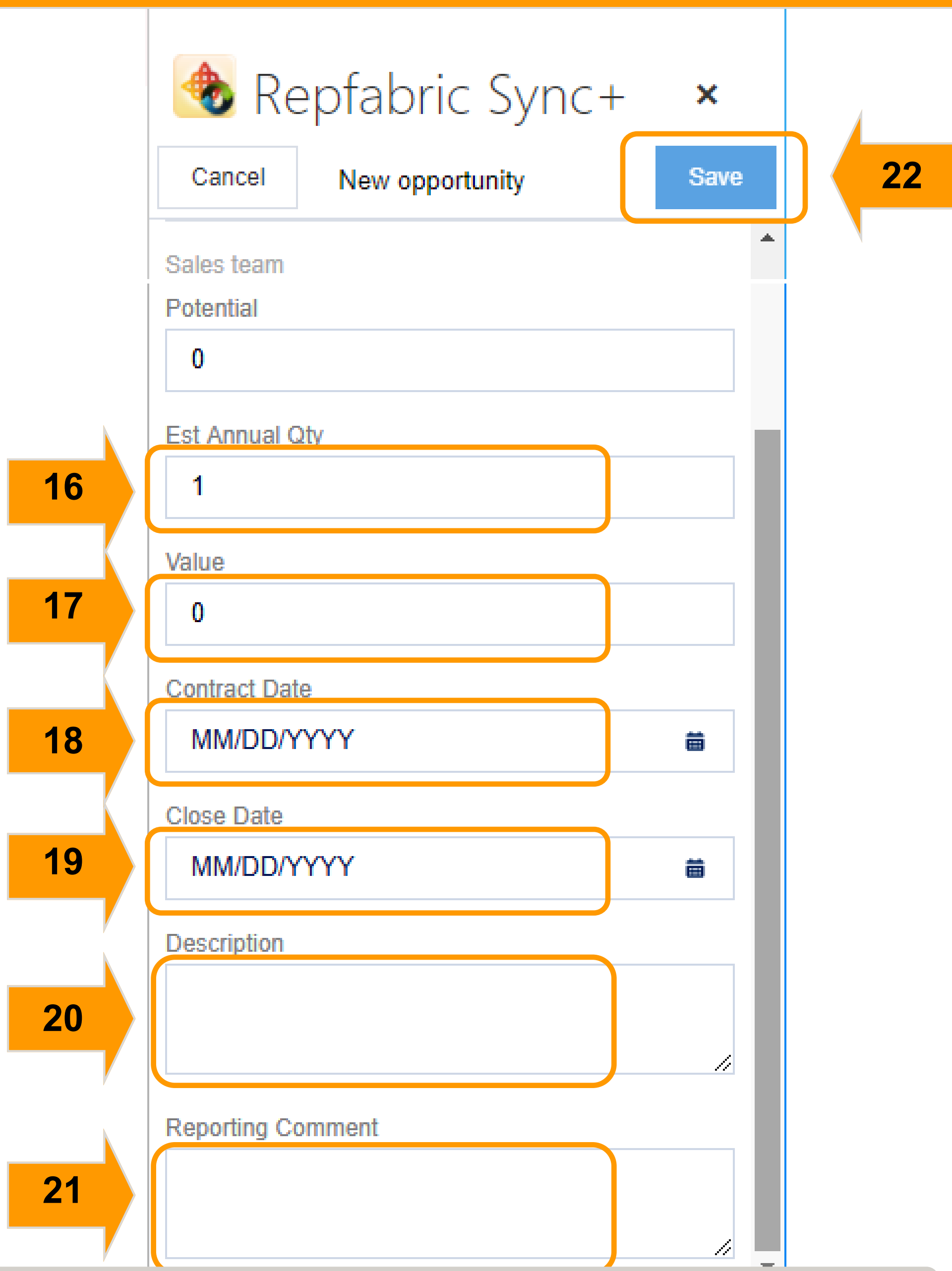
10. Left click drop-down arrow to select a status.
11. Type the "Next Step."
12. Use drop-down arrow to select sales team (if more than one).
13. Select follow up date (it will automatically populate with a date one week out).
14. Type priority status number.
15. Type the potential (this is a percentage field).

This image shows the drop-down options for "Status."



16. Type the estimated quantity they will purchase annually.
17. Type the dollar value of the annual sales.
18. Type the contract date (this field may have been re-labeled as ‘bid date’ or another term relevant to your company).
19. Type the close date (this field determines what quarter the opp value appears in forecast reports).
20. Type the description.
21. Type any reporting comments (remember, these comments can be included in a report for the principals/manufacturers).
22. Left click “Save.”

This image shows the last fields in the new opportunity.



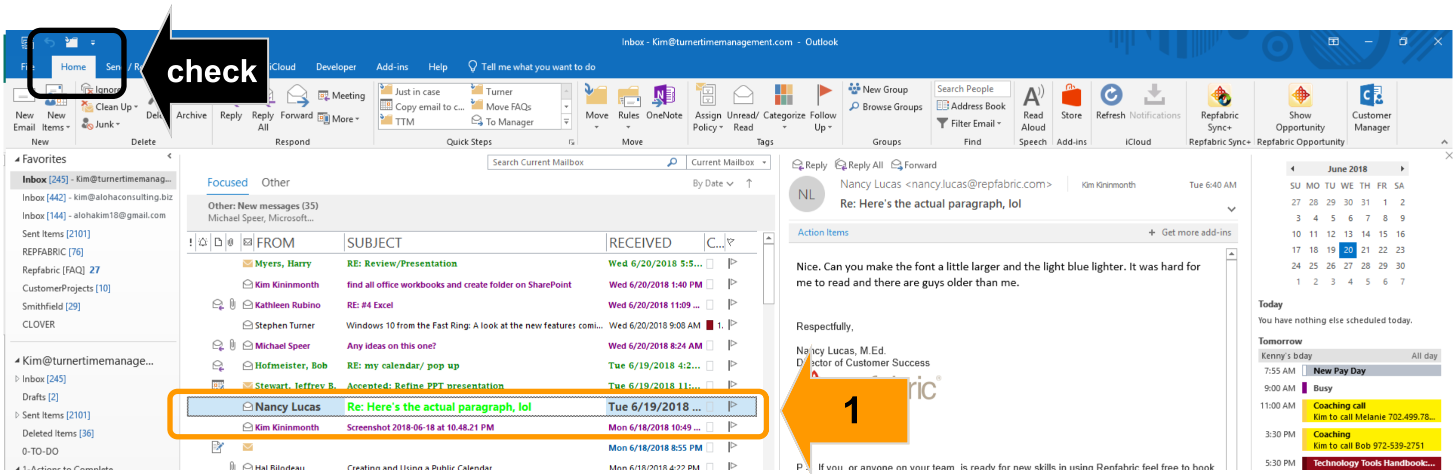
This concludes the instructions for this section.

How to Update an Opportunity in Sync+ in Outlook Desktop

You can update an opportunity in Outlook on your desktop.

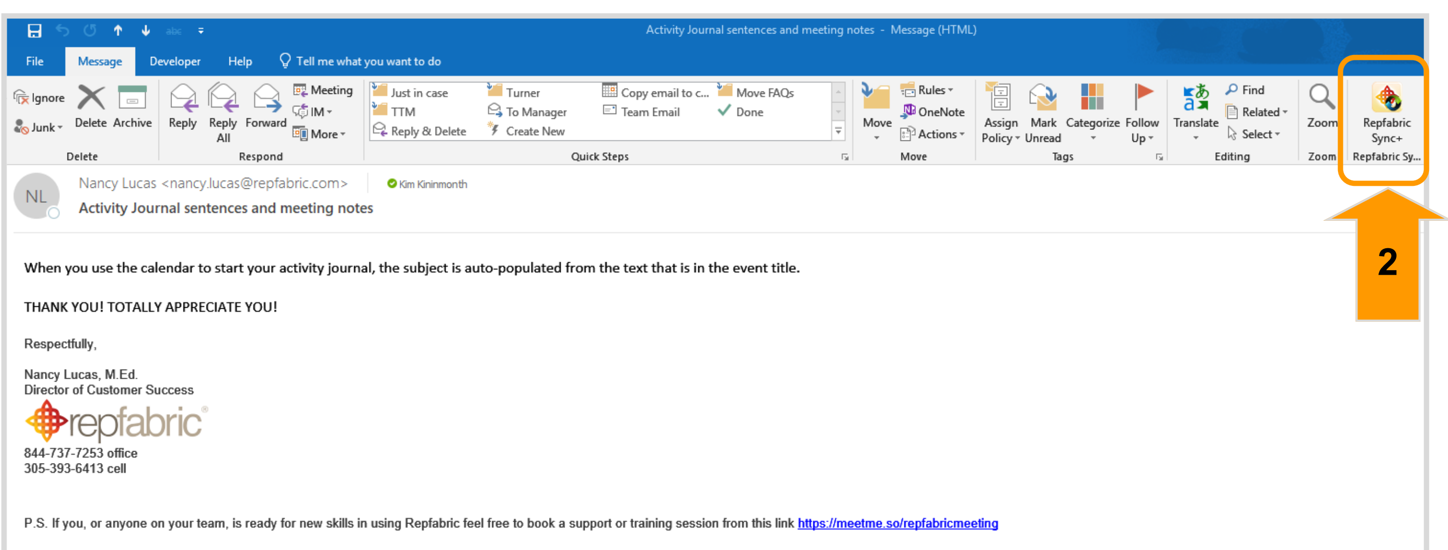
1. Left click desired email to open.
2. Left click “Repfabric Sync+” icon.

This image shows a selected e-mail in the sample Inbox. Double left click to open.
At the top you can see “Home” tab & the Repfabric Sync+ button you will see while viewing Inbox (or other folder).



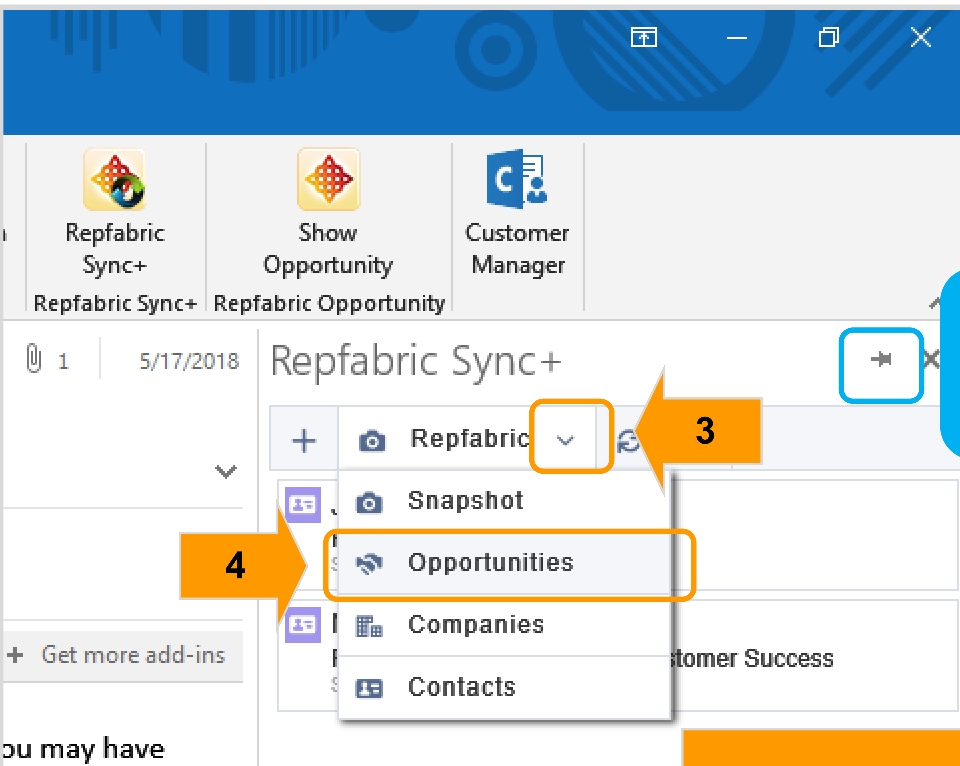
In order for the Repfabric add-in icons to show
Make sure you have the “Home” tab selected,
Before you open an email.
If it still does not appear, please send a screenshot to support@repfabric.com so we can help you.

This image shows the Repfabric Sync+ button in an **open** sample e-mail.



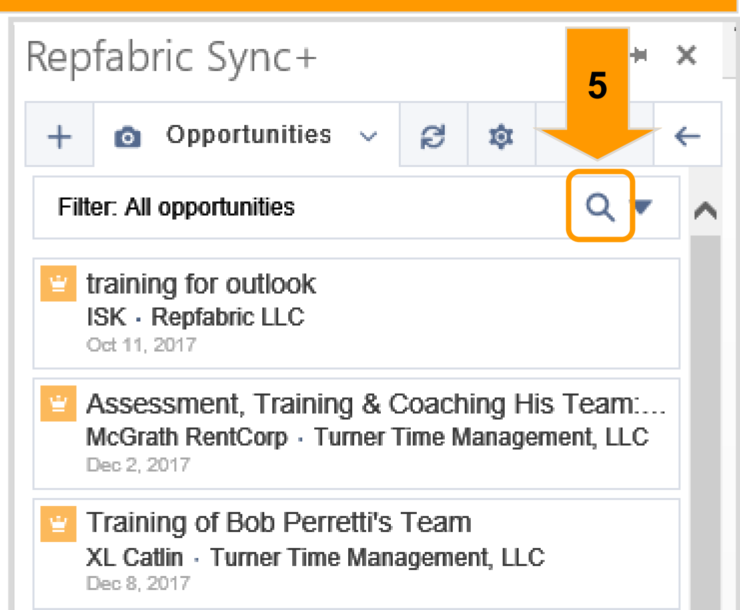
3. Left click arrow next to "Repfabric."
4. Left click "Opportunities."
5. Left click magnifying glass to search (if desired opp is not showing). *Optional*

This image shows the "Repfabric Sync+" button, the drop-down arrow and "Opportunities."



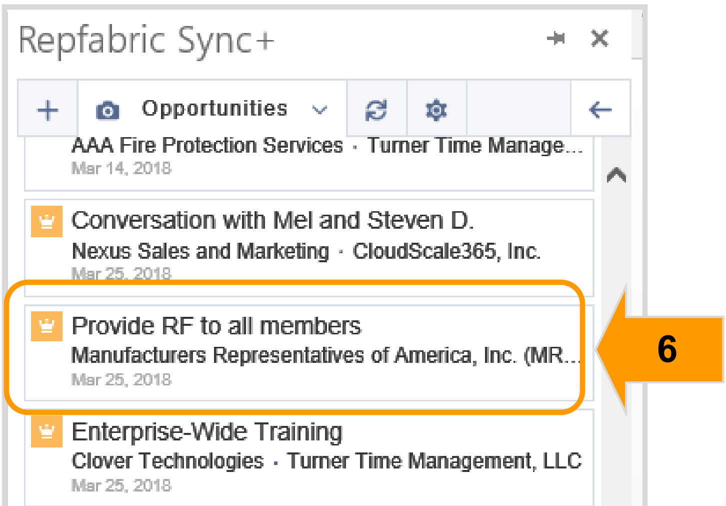
Press the "push pin" icon so that it points down (keeps the Repfabric Sync + Window open).

This image shows the magnifying glass to use for searching.

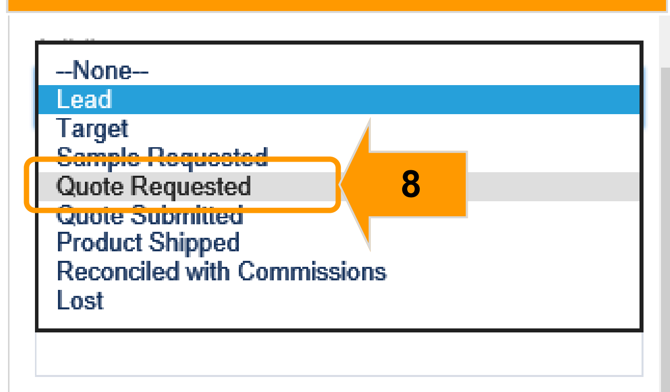


6. Left click desired opportunity.
7. Left click pencil icon to enable editing.
8. Update "Activity Stage" using drop-down selections.

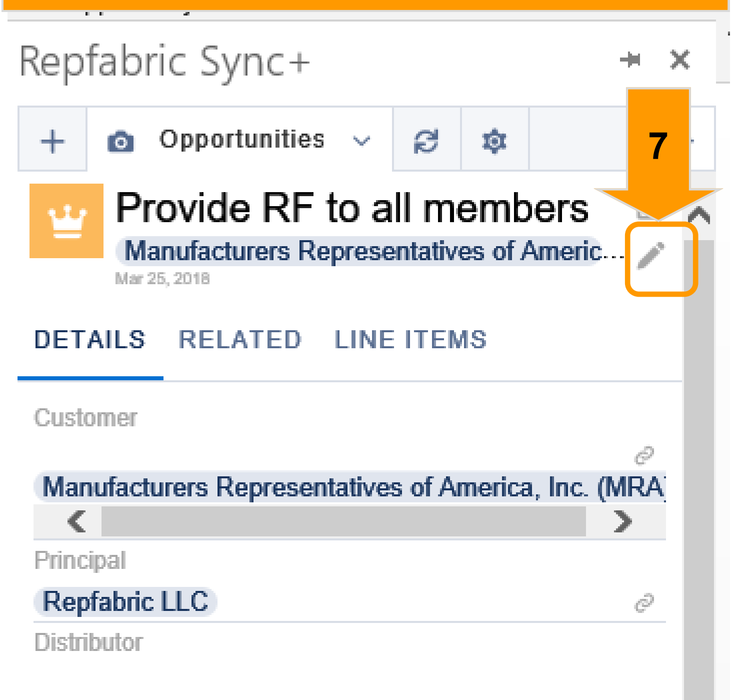
This image shows a sample list of opportunities.



This image shows the options for "Activity Stage."

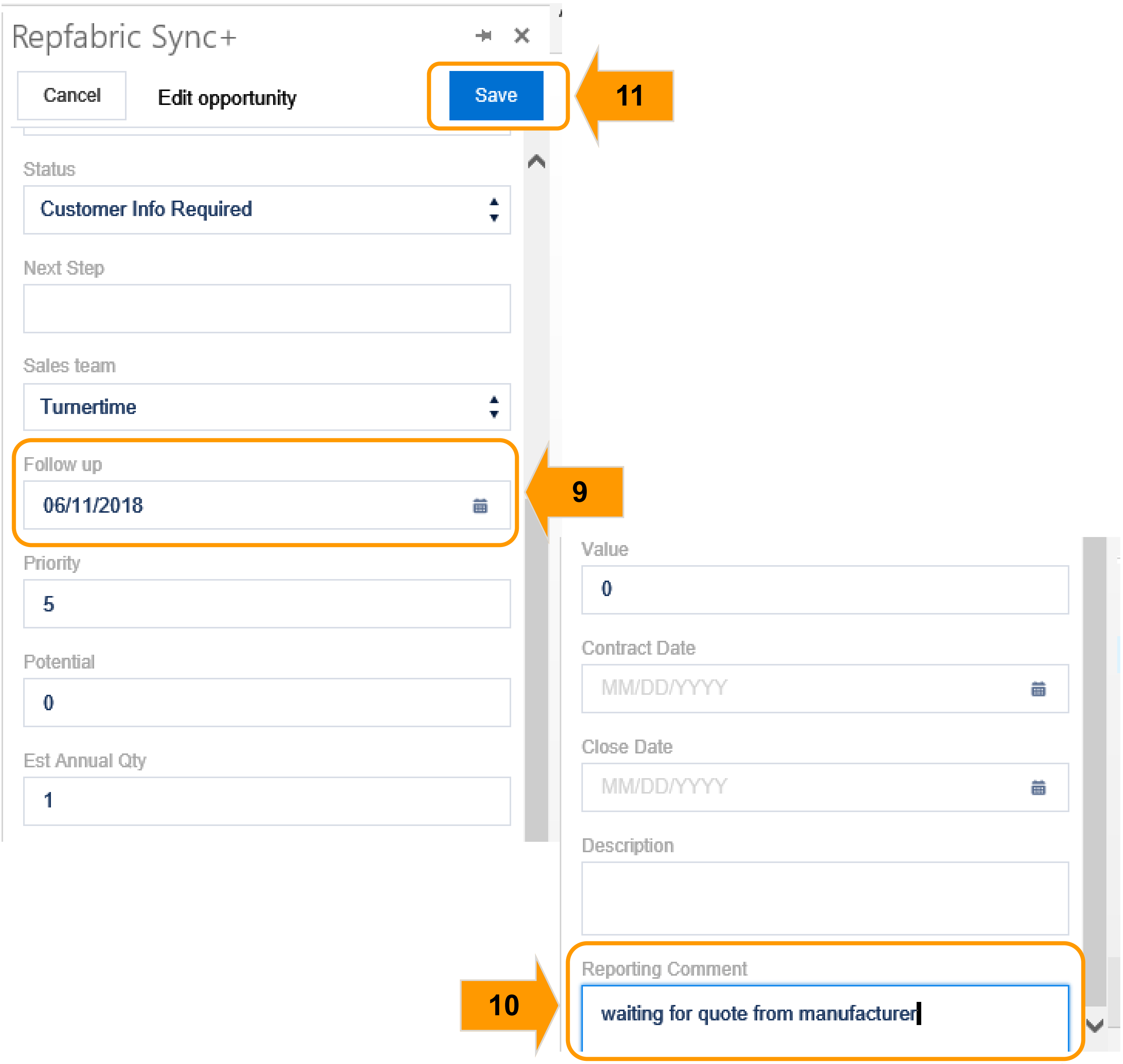


This image shows the pencil icon to allow editing.



9. Update "Follow Up" date.
10. Update "Reporting Comments" if necessary.
11. Left click "Save."

These images show follow up date, reporting comments and the "Save" button.



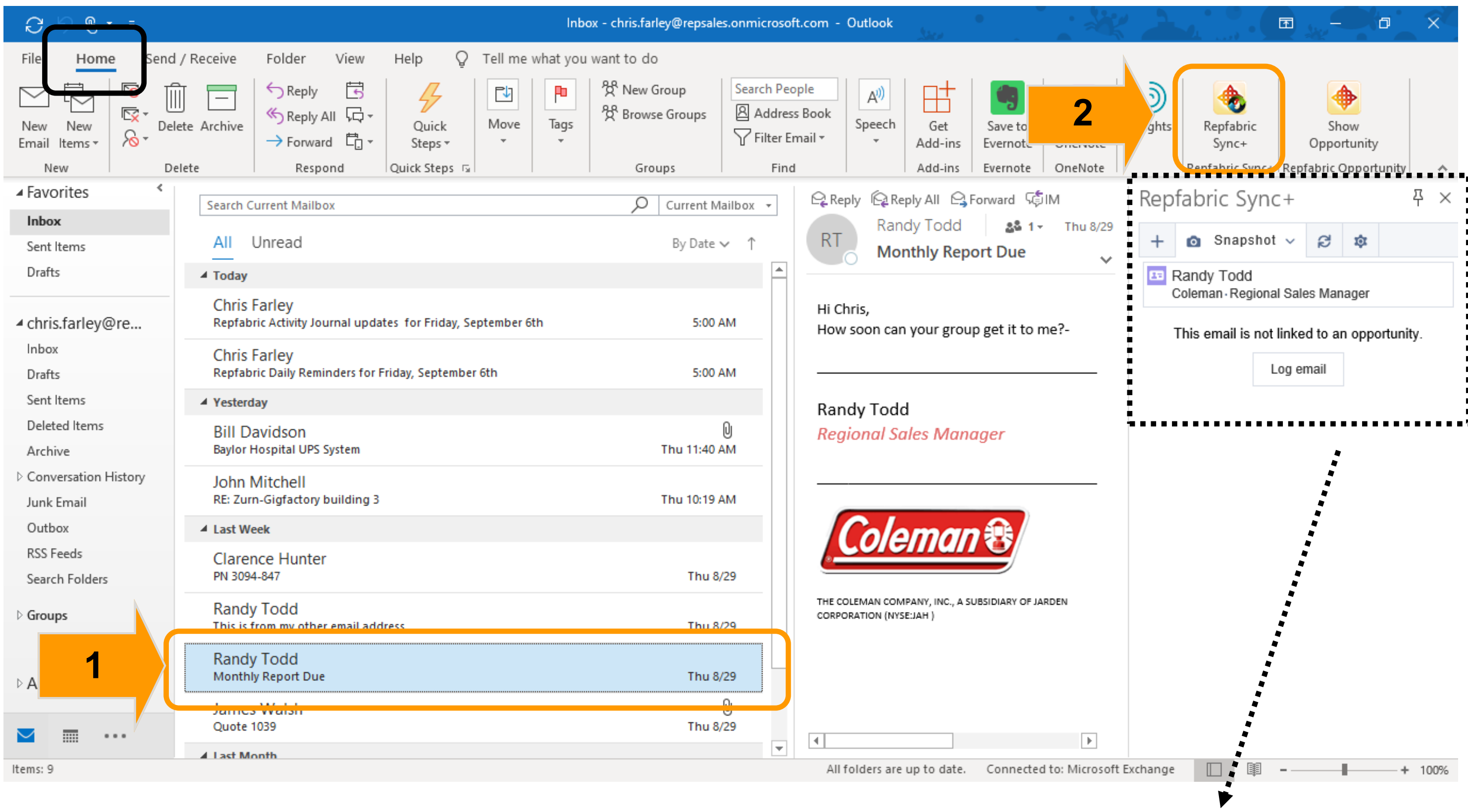
This concludes the instructions for this section.

How to Log Email to an Existing Opportunity in Sync+ Outlook Desktop

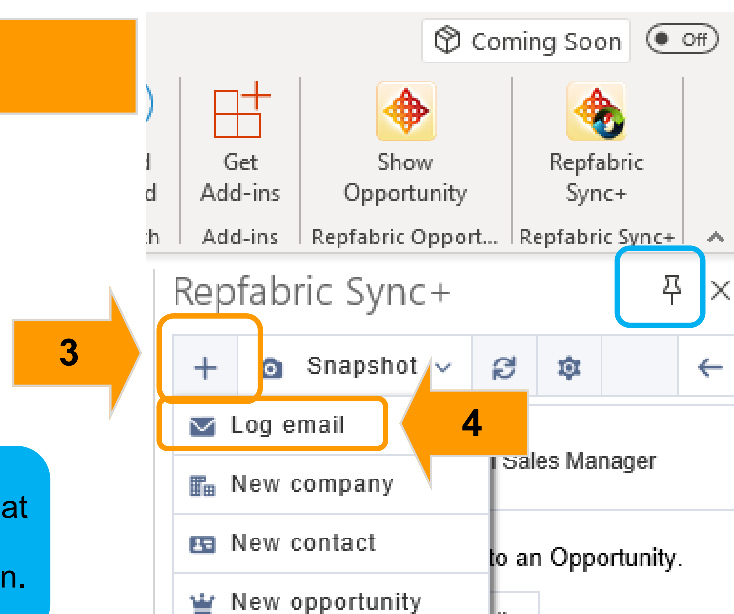
You can log an email to an opportunity that you created at an earlier time in Outlook on your desktop.

1. Left click desired email.
2. Left click “Repfabric Sync+” icon (unless window is already open on the right).
3. Left click the “+” Plus sign and left click “Log email.”

This image shows a selected e-mail in the sample Inbox. If the “Repfabric Sync+” panel is not showing, left click the button.



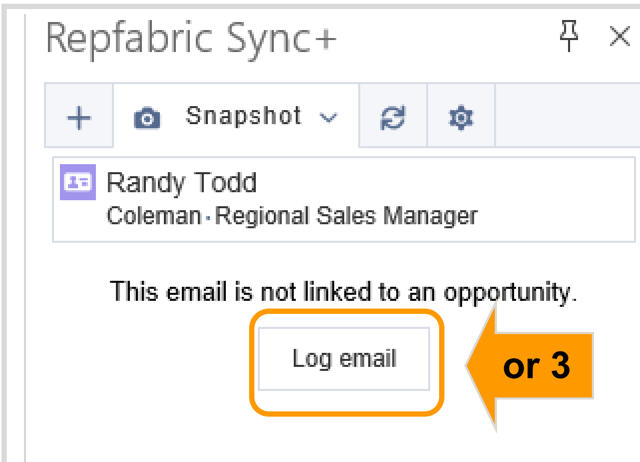
This image shows the “+” button and “Log email.”



Press the “push pin” icon so that it points down to keep the Repfabric Sync + Window open.

3. **OR** Left click “Log email” button.
4. Left click the check box of the opportunity to which you want the email to log
5. Left click save

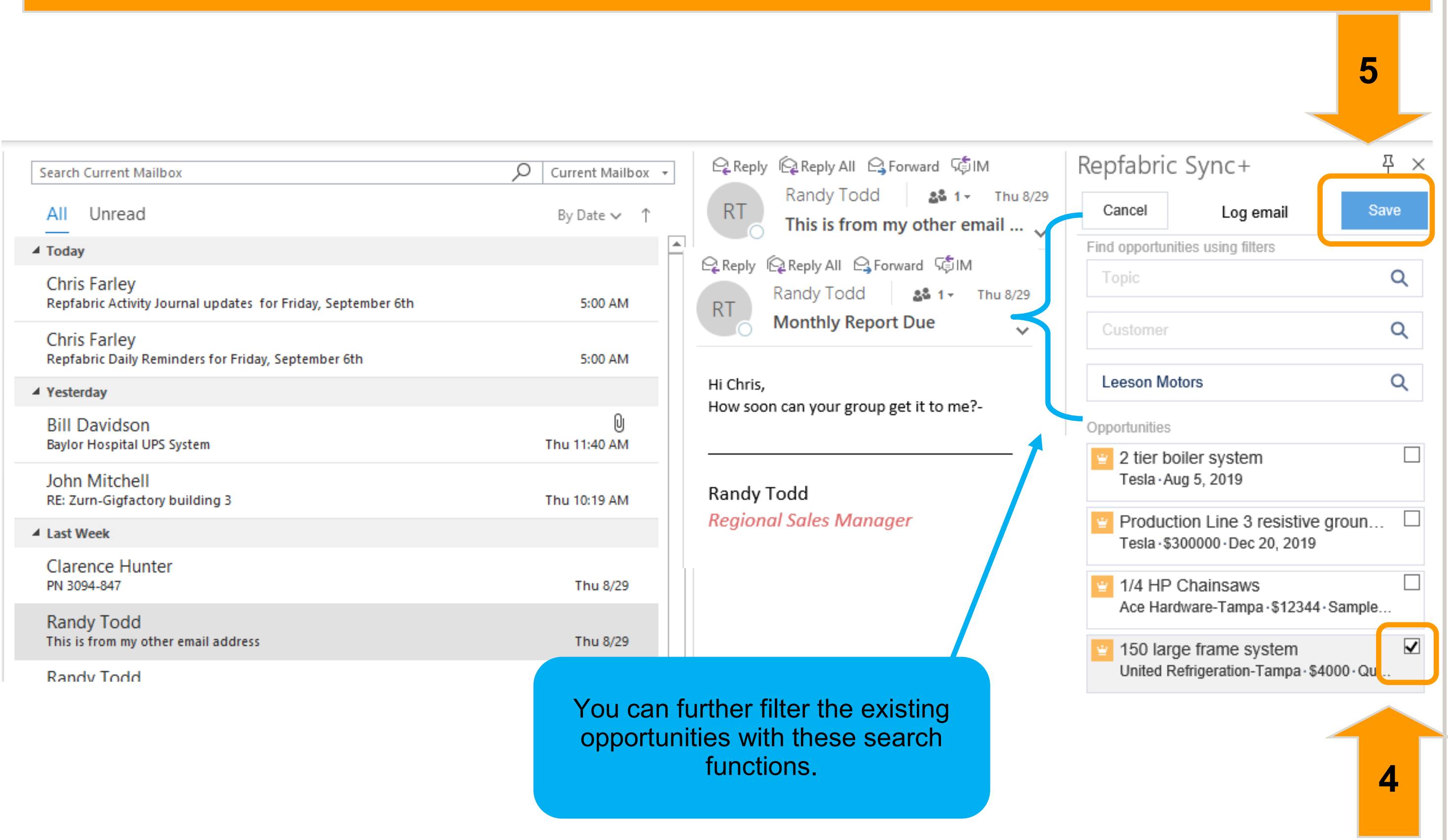
This image shows the alternate “Log email” button that will be available in a contact who is also in Repfabric.



*Please note:

- You can ONLY log an email to ONE opportunity (needed to enable future emails to auto-match to this opportunity)
- The email highlighted will now be visible within the Repfabric Web Portal and Mobile app for this opportunity and available to others on your sales team.

This image shows the selection of an opportunity to attach the email to.



This concludes the instructions for this section.

How to jump from Outlook into Repfabric in 1 click

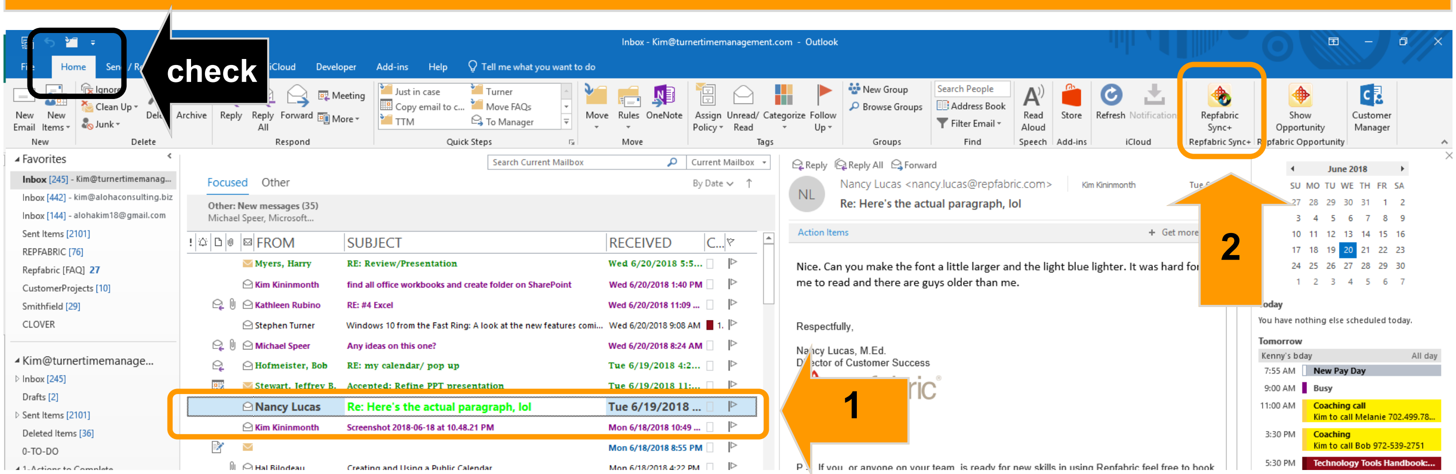
A key productive feature of the Sync+ connector in Outlook is the ability to jump into the web portal to when viewing a contact, a company or an opportunity.

Examples of how this feature can be used:

- View any past email sent to or from a contact
- File an activity journal for a contact in 2 clicks
- View or Fwd. or Reply to emails linked to an opportunity
- Jump to an opportunity to sync your updates to an external system using CRMSync

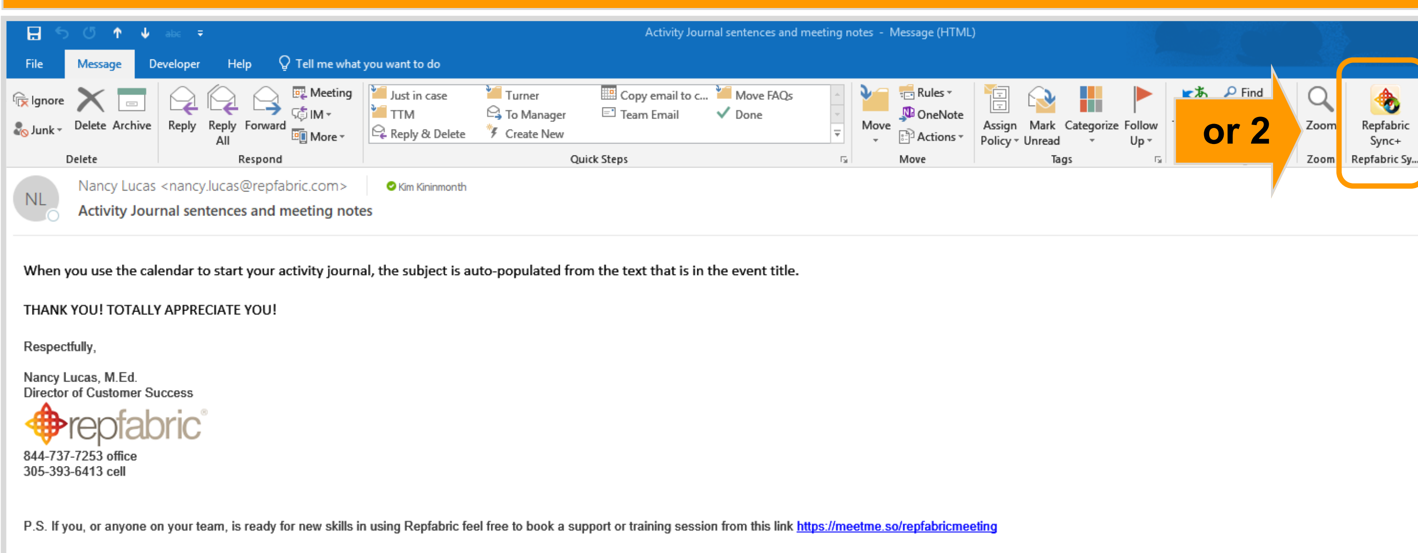
1. Left click desired email to open.
2. Left click "Repfabric Sync+" icon (from Inbox OR from open email).

This image shows a selected e-mail in the sample Inbox.
At the top you can see "Home" tab & the Repfabric Sync+ button you will see while viewing Inbox (or other folder).



In order for the Repfabric add-in icons to show
Make sure you have the "Home" tab selected,
Before you open an email.
If it still does not appear, please send a screenshot to support@repfabric.com so we can help you.

This image shows the Repfabric Sync+ button in an **open** e-mail.

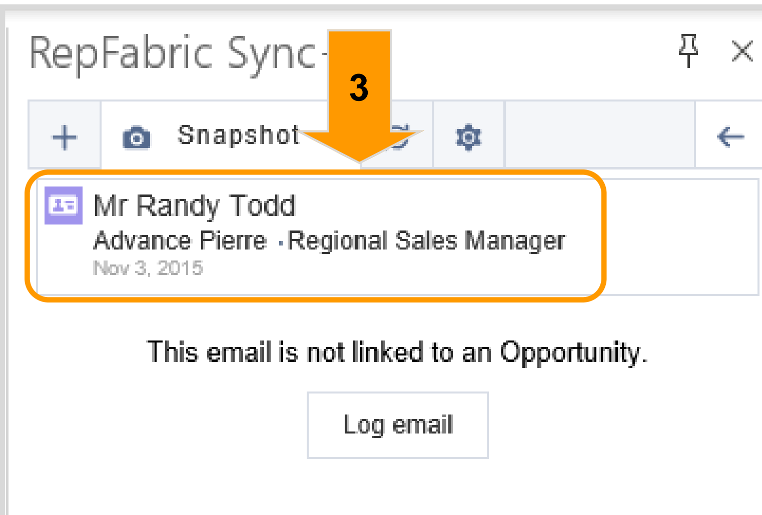


For training on this topic or to schedule a support session, please go to www.meetme.so/RepfabricMeeting
At anytime, you can email support@repfabric.com for help or call 844-737-7253.

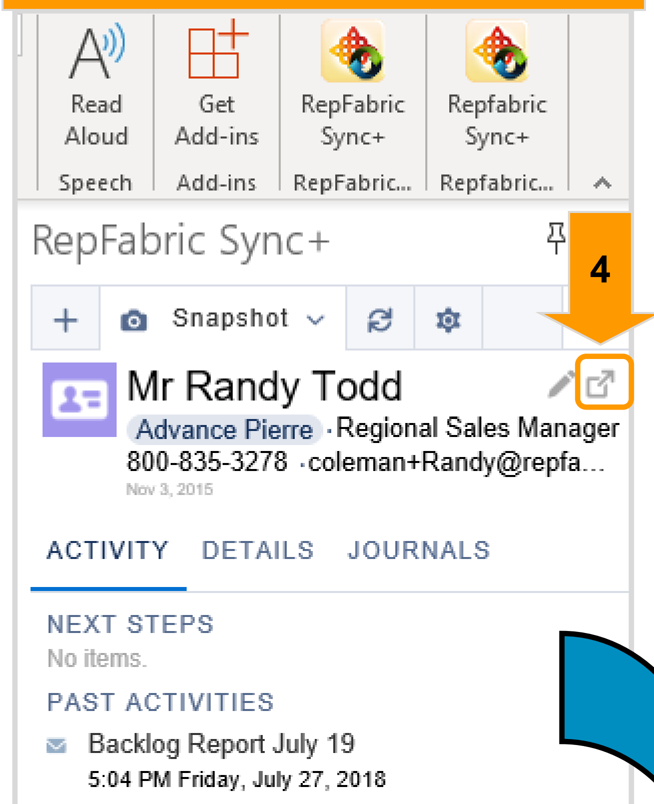
To View a Contact in Repfabric portal:

3. Left click the contact's purple business card icon
4. Left click the check box with arrow next to the edit pencil (this triggers your browser window to open to the contact's page in Repfabric)

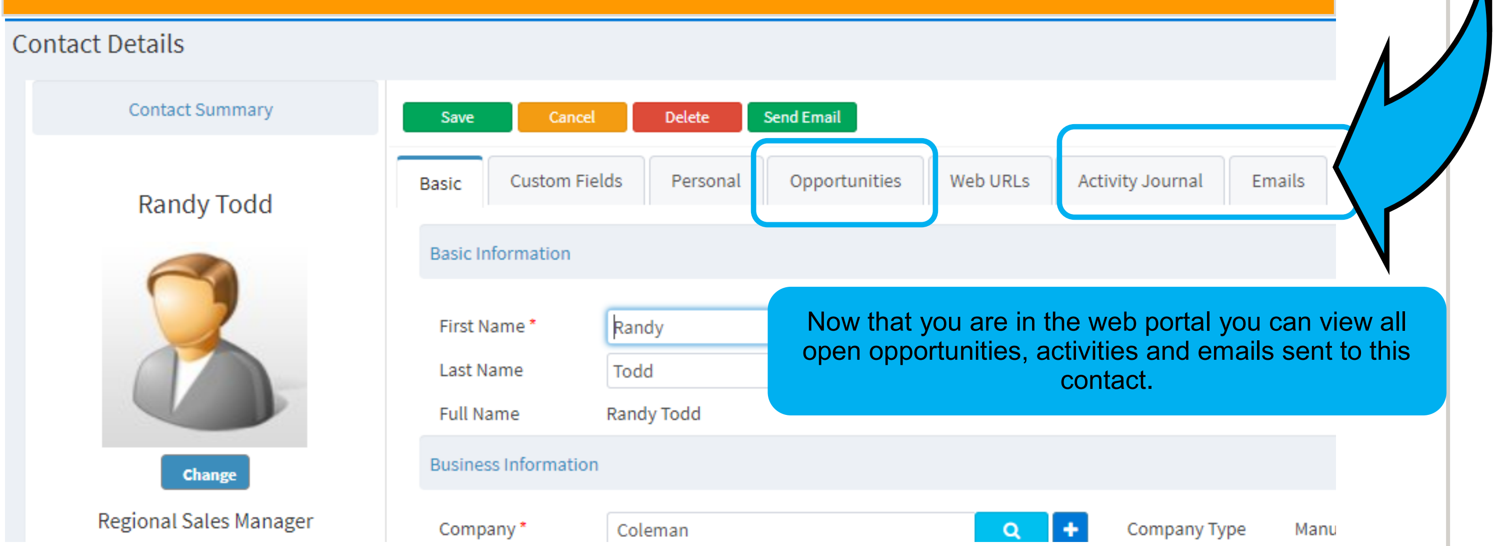
This image shows the "Repfabric Sync+" contact card drop-down arrow and "Opportunities."



This image shows the contact detail card



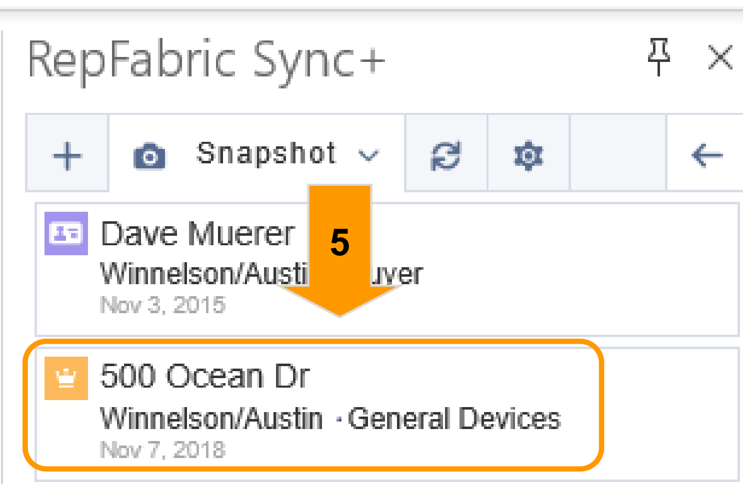
This image shows the contact detail page in Repfabric resulting from the Pop out icon pushed in Step 4



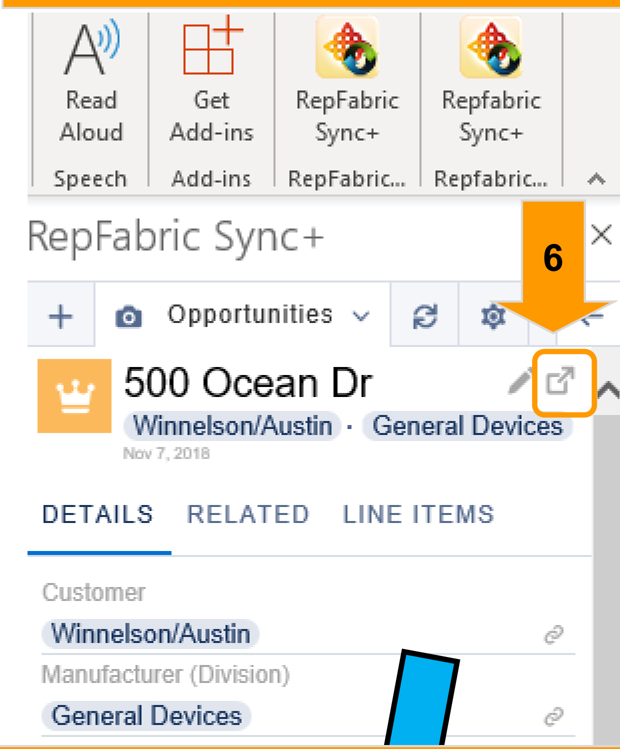
To View an Opportunity in Repfabric portal:

5. Left click the opportunity's **golden crown** icon card
6. Left click the check box with arrow next to the edit pencil (this triggers your browser window to open to the opportunity's page in Repfabric)

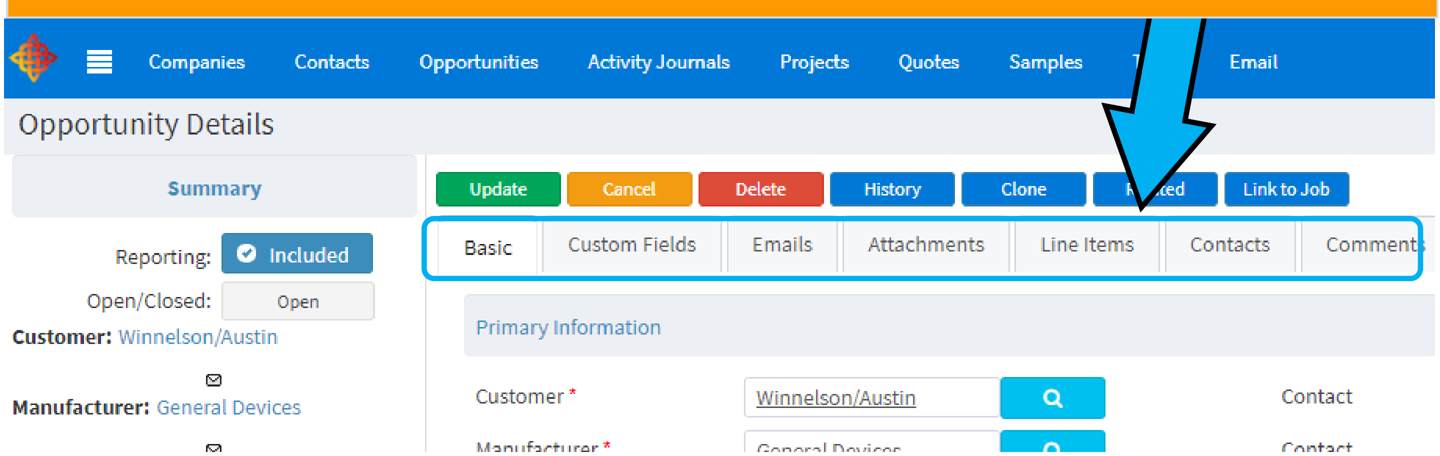
This image shows the "Repfabric Sync+" opportunity card drop-down arrow and "Opportunities."



This image shows the contact detail card



This image shows the contact detail page in Repfabric resulting from the Pop out icon pushed in Step 6



Now that you are in the web portal you can view all line items, comments, CRMSync triggers, attachments and related emails.

This concludes the instructions for this section.

How to Create an Opportunity from an Activity Journal in Mobile App

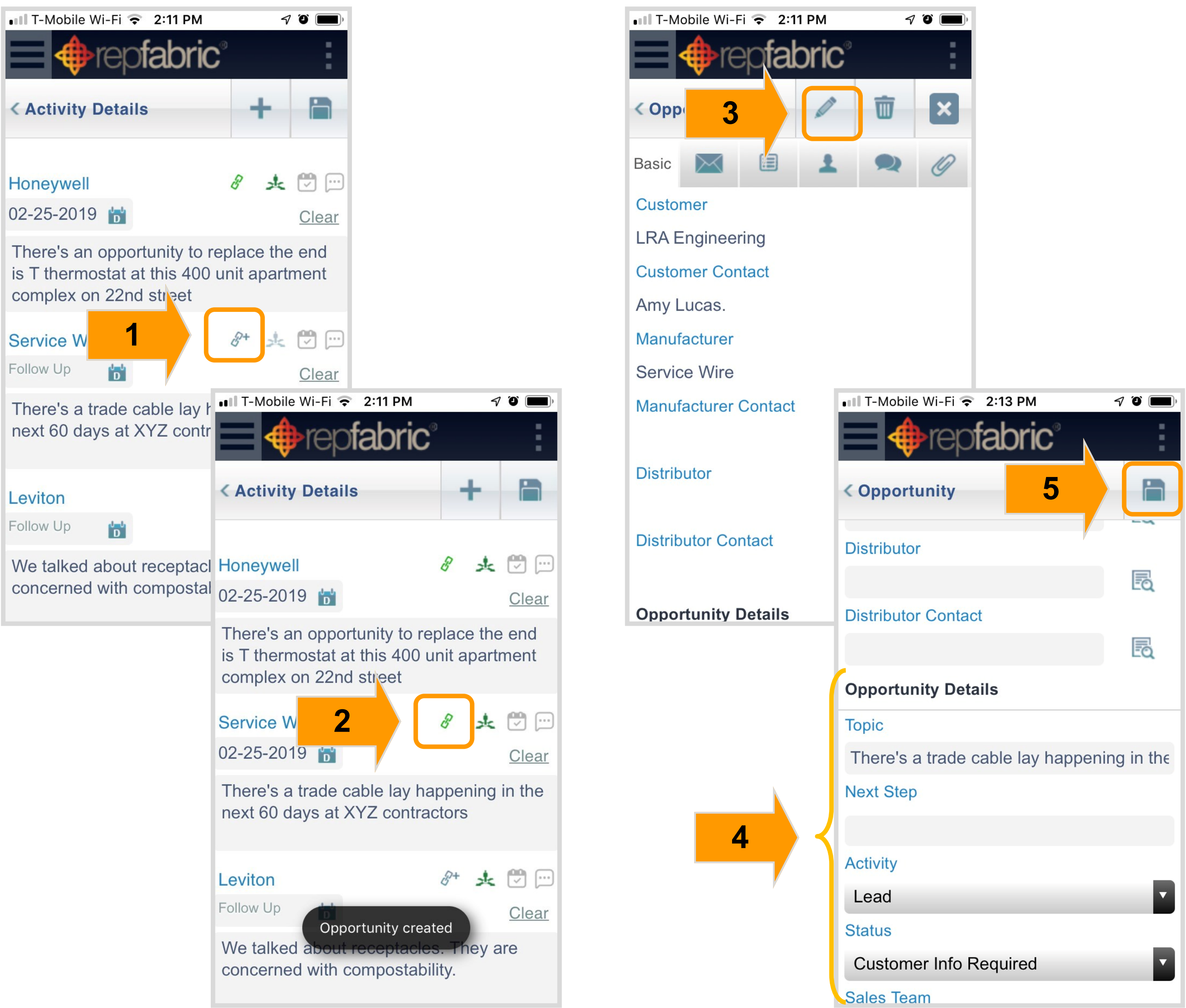
If you create an activity journal after a sales call, the easiest and quickest way to create an opportunity is will one click using the short cut that looks like a grey chain with a plus sign.

Once you create the opportunity in the mobile app from the activity journal, that short cut turns to a green chain link. That is now a short cut directly to the opportunity you just created.

From the saved Activity Journal:

1. Tap the “Create opportunity” button (grey chain with a plus sign).
2. Tap the green chain and it will take you to the opportunity to edit it.
3. Tap the pencil.
4. Make edits as desired.
5. Tap “Save.”

These images show how to create an opportunity from the activity journal in the mobile app.
Tap the chain+ symbol to create an opportunity.



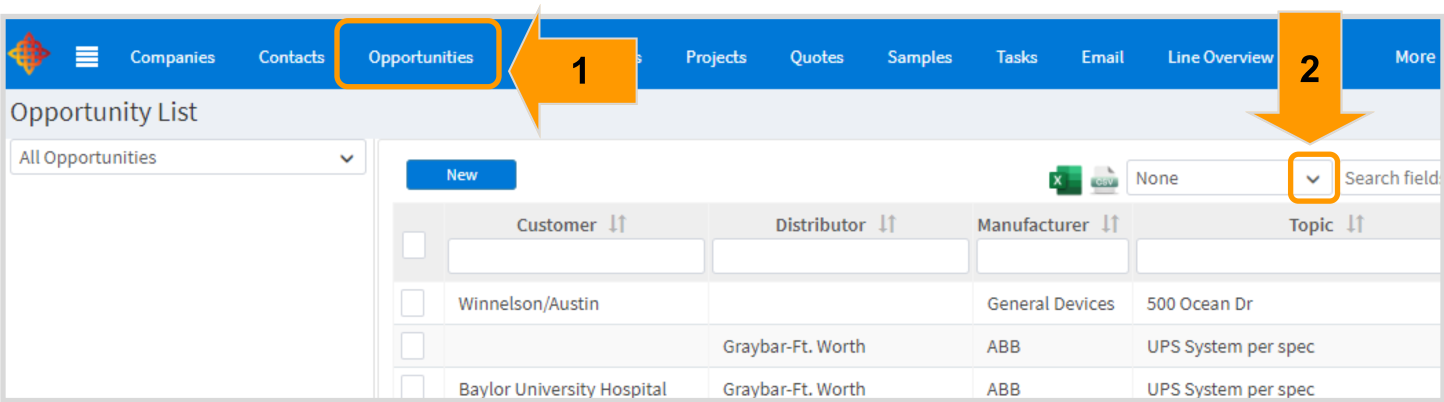
How to Filter/Sort Opportunities (web portal)

You can sort opportunities by a certain field (i.e. Next Step) to have all the same type grouped together by action needed. You can also filter opportunities so that you only see a certain group (i.e. "Activity" Sample Submitted) which will make it easier to follow up with a group of opportunities that have the same action required.

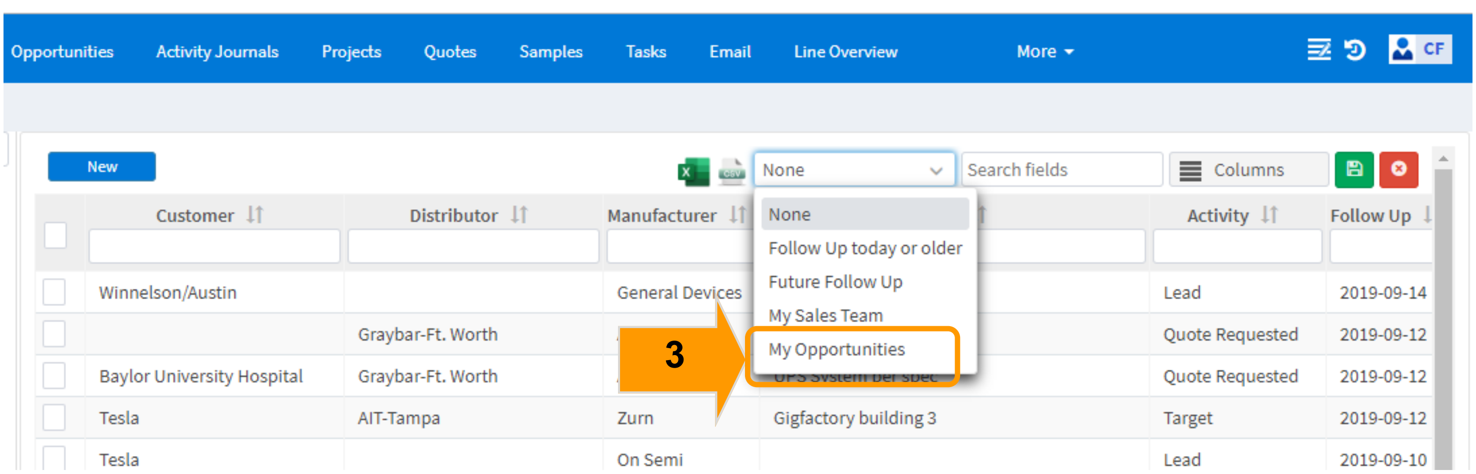
General filter:

1. Left click "Opportunities."
2. Left click drop-down arrow (this is the "filter")
3. Left click desired filter ("None" is the default).

This image shows the list of Opportunities sorted alphabetical by customer name.



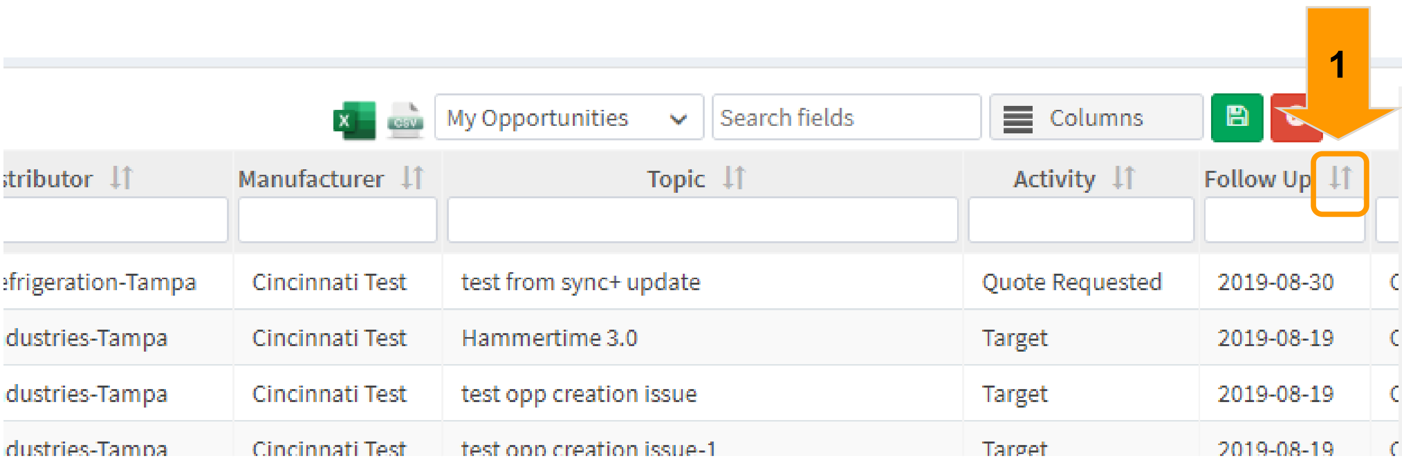
This image shows where to find
"Home" and "OppLoop"



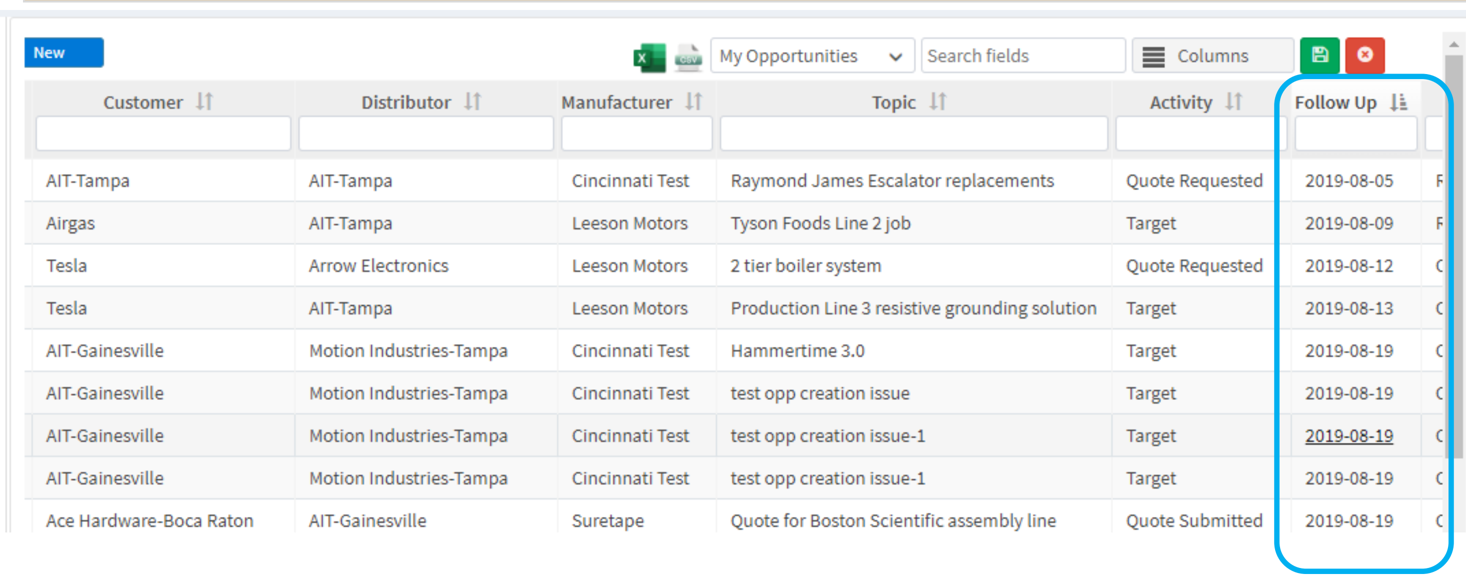
Simple sort: this will organize a column, grouping similar items together. Choose the up arrow to sort alphabetically/numerically from A-Z/1-999.

1. Left click on the arrow at the top of column you want to sort by.

This image shows the list of Opportunities sorted alphabetical by customer name.



This image shows the list of Opportunities sorted by "Follow Up."

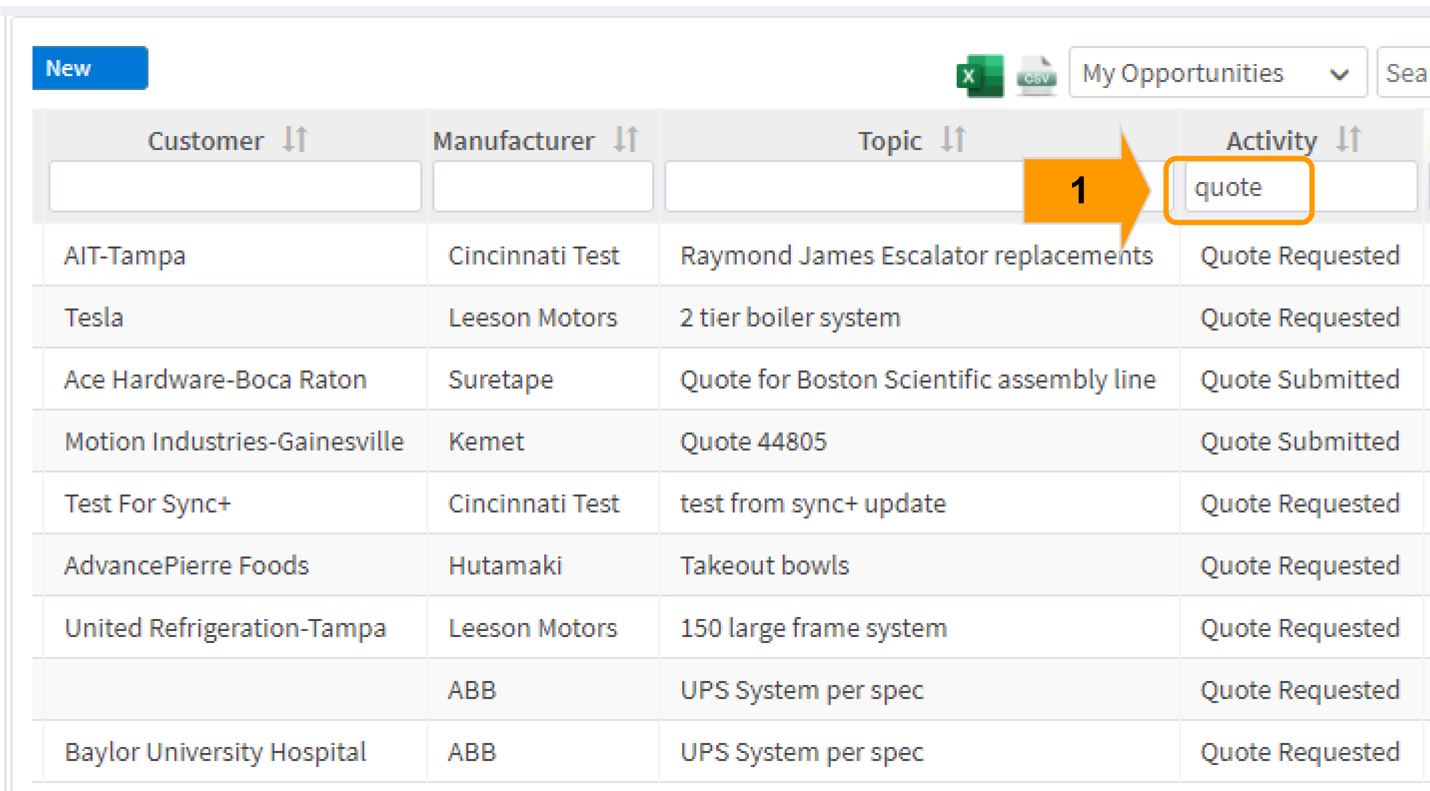


Simple Filter: this will filter out all other items except for the ones you choose to display.

1. Type the words you want to see, in the column you are filtering by.

   In this example we will filter by "Activity" column.
   We want to see all opps that have **quote** anywhere in this field.

This image shows all opps with **quote** in "Activity" column.

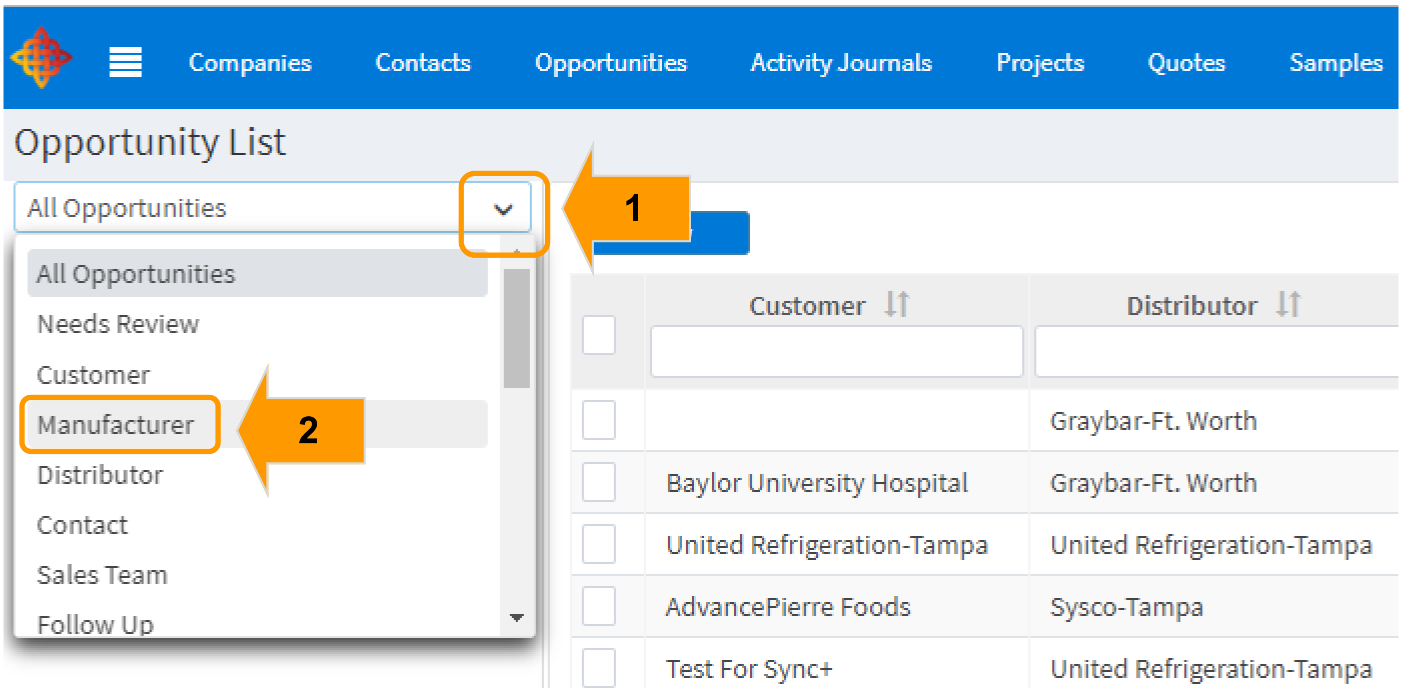


Customer	Manufacturer	Topic	Activity
AIT-Tampa	Cincinnati Test	Raymond James Escalator replacements	Quote Requested
Tesla	Leeson Motors	2 tier boiler system	Quote Requested
Ace Hardware-Boca Raton	Suretape	Quote for Boston Scientific assembly line	Quote Submitted
Motion Industries-Gainesville	Kemet	Quote 44805	Quote Submitted
Test For Sync+	Cincinnati Test	test from sync+ update	Quote Requested
AdvancePierre Foods	Hutamaki	Takeout bowls	Quote Requested
United Refrigeration-Tampa	Leeson Motors	150 large frame system	Quote Requested
	ABB	UPS System per spec	Quote Requested
Baylor University Hospital	ABB	UPS System per spec	Quote Requested

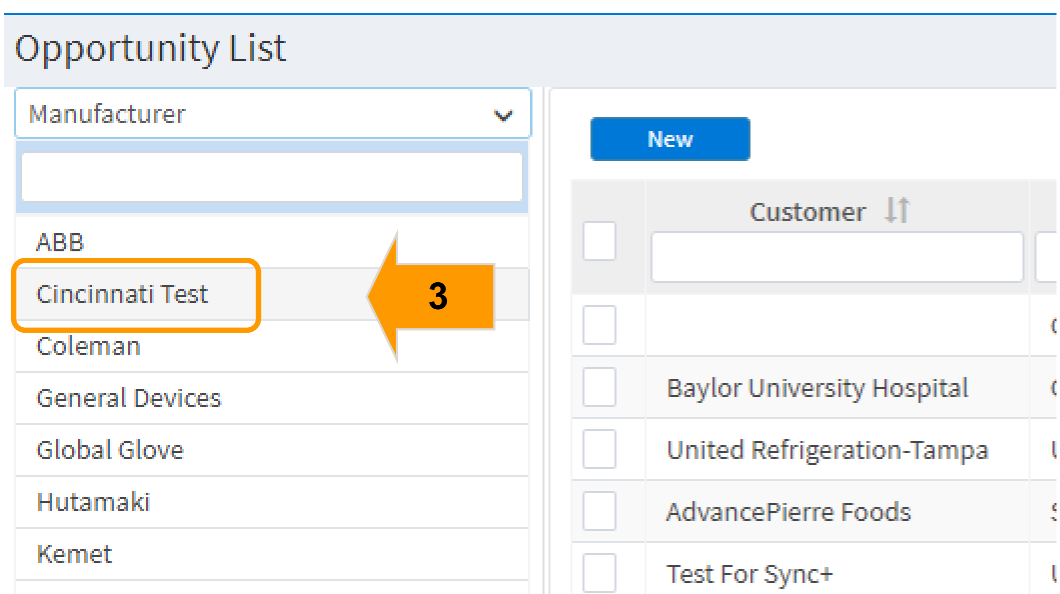
How to use Combined Searches
You can combine fields to search for specific situations using multiple criteria. For example, use the left column to sort by principal (manufacturer). Then Sort by customer – you can see all opps at one time that need information from that manufacturer.

1. Left click drop-down arrow for All Opportunities.
2. Left click desired field (in this example “Manufacturer”).
3. Left click desired Manufacturer.

This image shows where you select a field from the drop-down list.

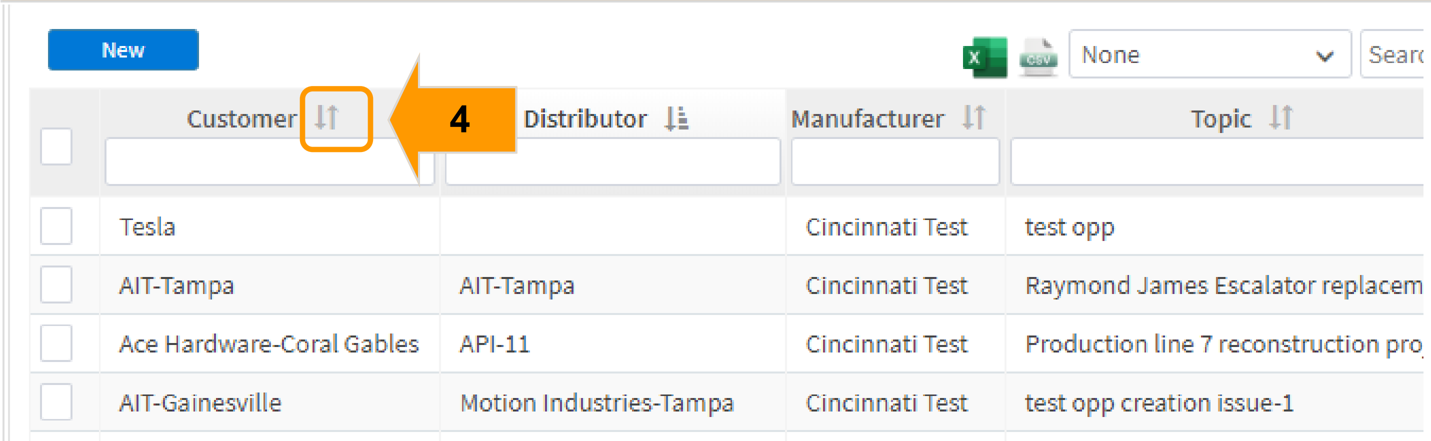


This image shows a Manufacturer selected from the list.

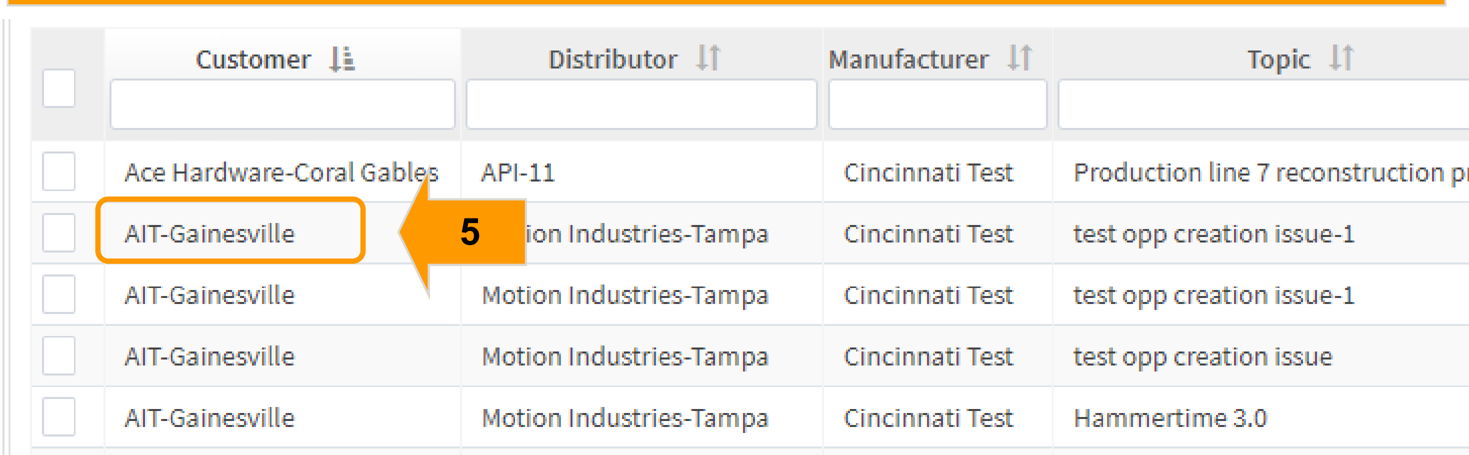


4. Left click arrow in desired column to sort (in this example we will sort by customer).
   Now I can call AIT Gainesville only once and follow up on the status of all opps. This eliminates making two calls to one customer.
5. Left click desired customer.
6. Left click “Contact” tab.

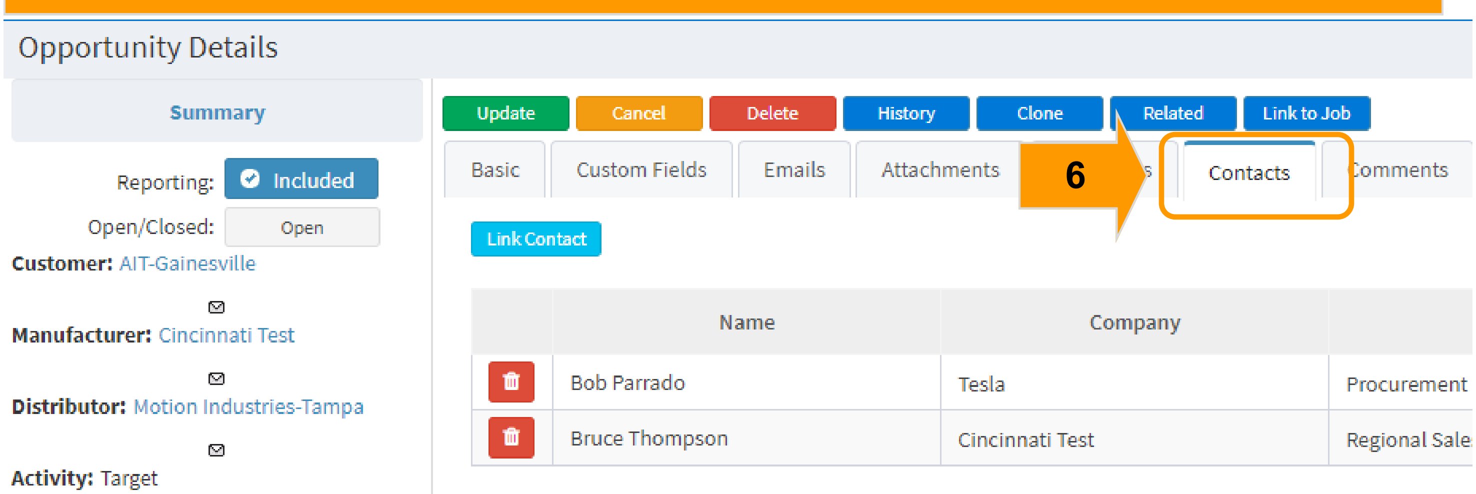
This image shows where you sort the Customer field alphabetically.



This image shows where you can left click “Contact” tab to find contact information.



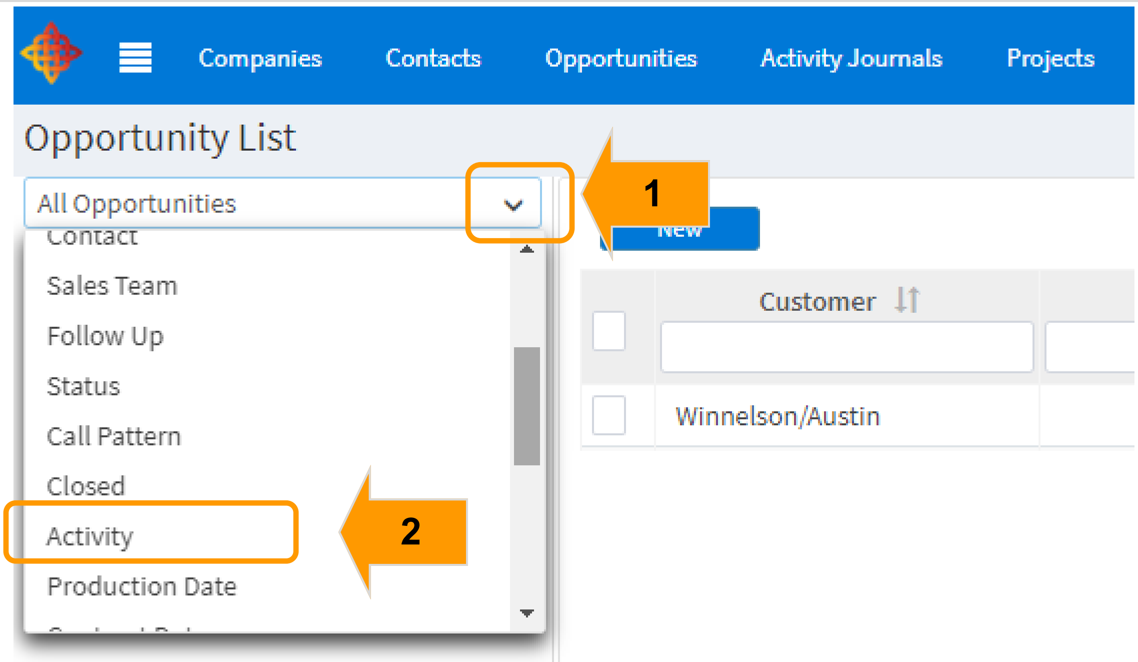
This image shows where you can view all the contacts associated with this customer.

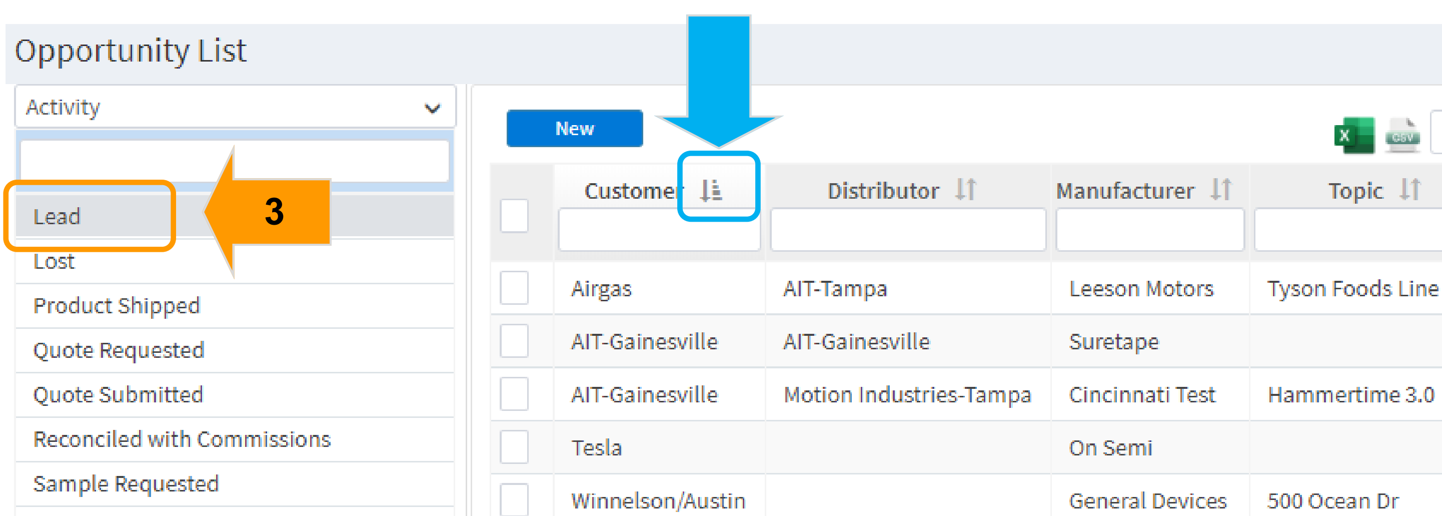


Another option is to sort by activity stage and run a sales meeting – ok the funnel looks like we have a ton of leads, how many new targets are you guys going for this week, when are these going to be wrapped up etc.?

1. Left click drop-down arrow for All Opportunities.
2. Left click desired field (in this example “Activity”).
3. Left click desired activity type.

These images shows how to filter by ”Activity” “Lead”, sorted by “Customer.”





This concludes the instructions for this section.

How to Create and Add Opportunities to Jobs

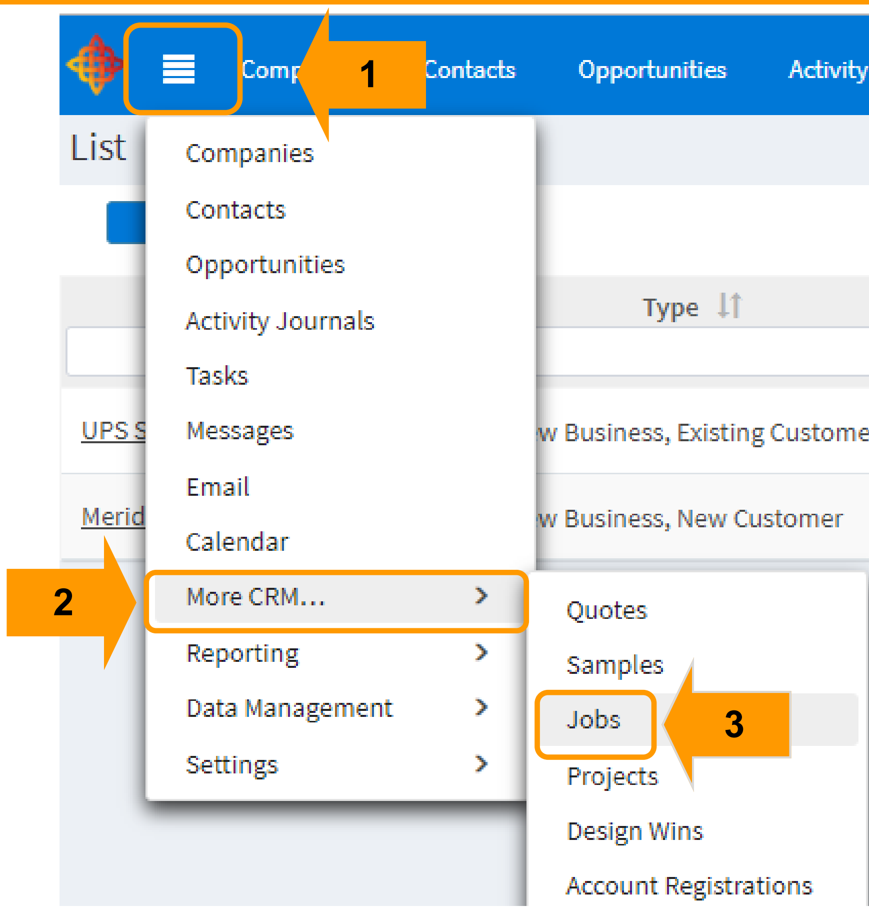
Opportunities in Repfabric are essentially wrappers of follow up dates and other related information that can be linked to a Repfabric "Job" or "Project". By linking an opportunity to a job, you get the full picture of all of the customers, contractors and distributors attempting to participate in the job. When a contractor wins the job, you can bulk close the lost opportunities to distributors and contractors that did not win the business, while digging deeper into the opportunities (and quotes within them) to win the business.

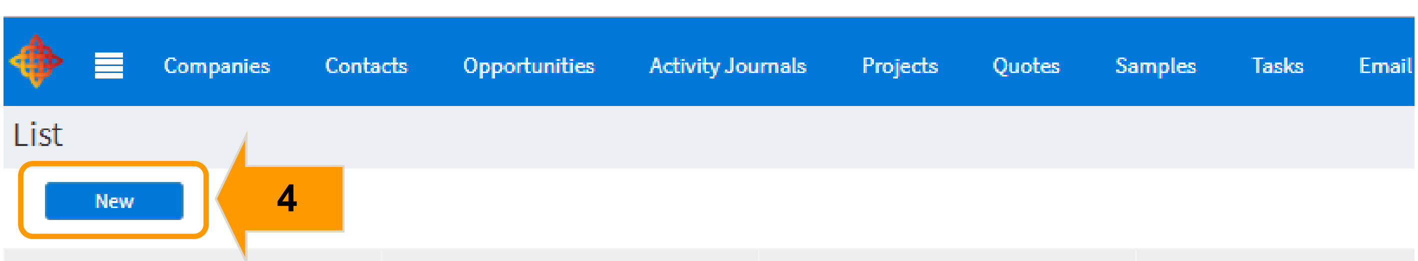
If you already have opportunities related to a site location, you can add them quickly to the new job you create. These "jobs" are also surfaced on the mobile app's map.

Create a "Job":

1. Left click the global memu.
2. Hover over "More CRM."
3. Left click "Jobs."
4. Left click "New."

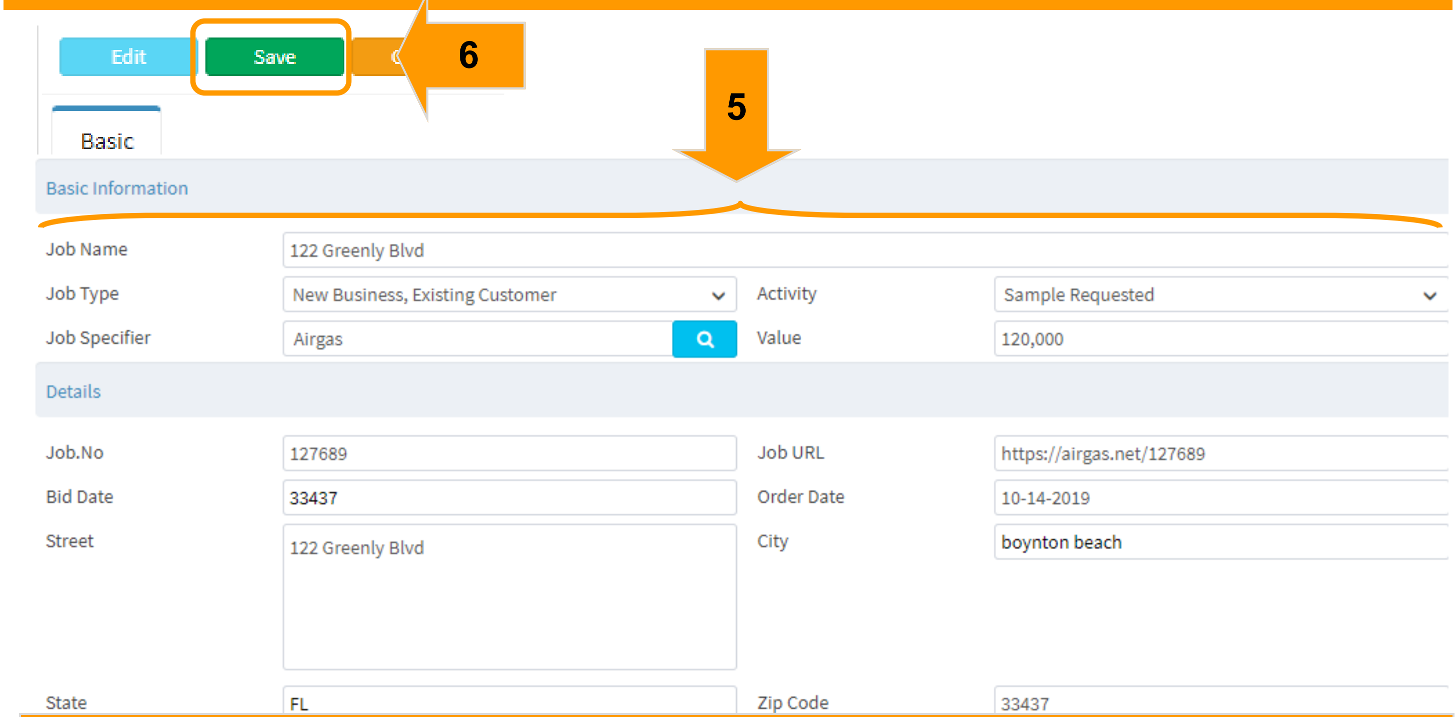
This image shows where to find "More CRM" which includes "Jobs."



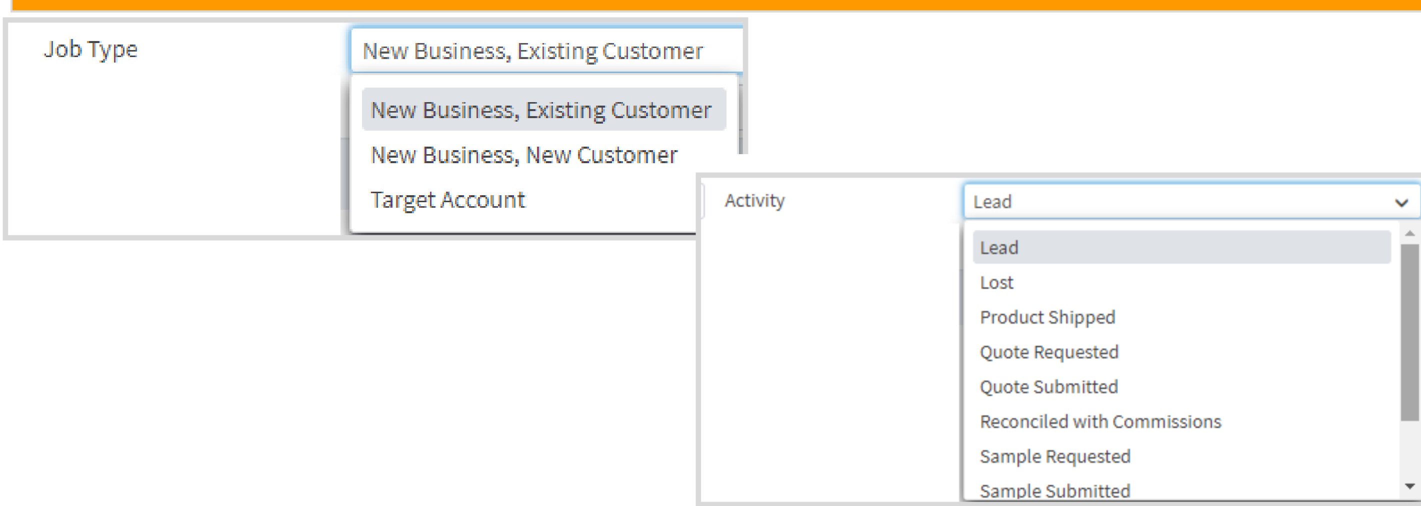


5. Complete the information in the job creation screen.
    - **Job name** is the identifiers that allow you or someone on your team to find the job quickly
    - **Address** fields are used to place the job on a map for the outside sales team
    - **Specifier** field is used to identify the company setting the design specifications
    - **Job Type** is for sorting (in this example , which is configured by your administrator in the Jobs sub-table
    - **Value** is the estimated sales dollar value of what you could sell into the job
    - **Dates** are estimates of the important milestone dates of the job
    - **Job URL** is a web link to your quote system or online description of the job
    - **Activity** is the current stage of the job (same as Activity Stage for opps).
6. Left click "Save."

This image shows the job basic creation screen



These images show the drop-down options for "Job Type" and "Activity."



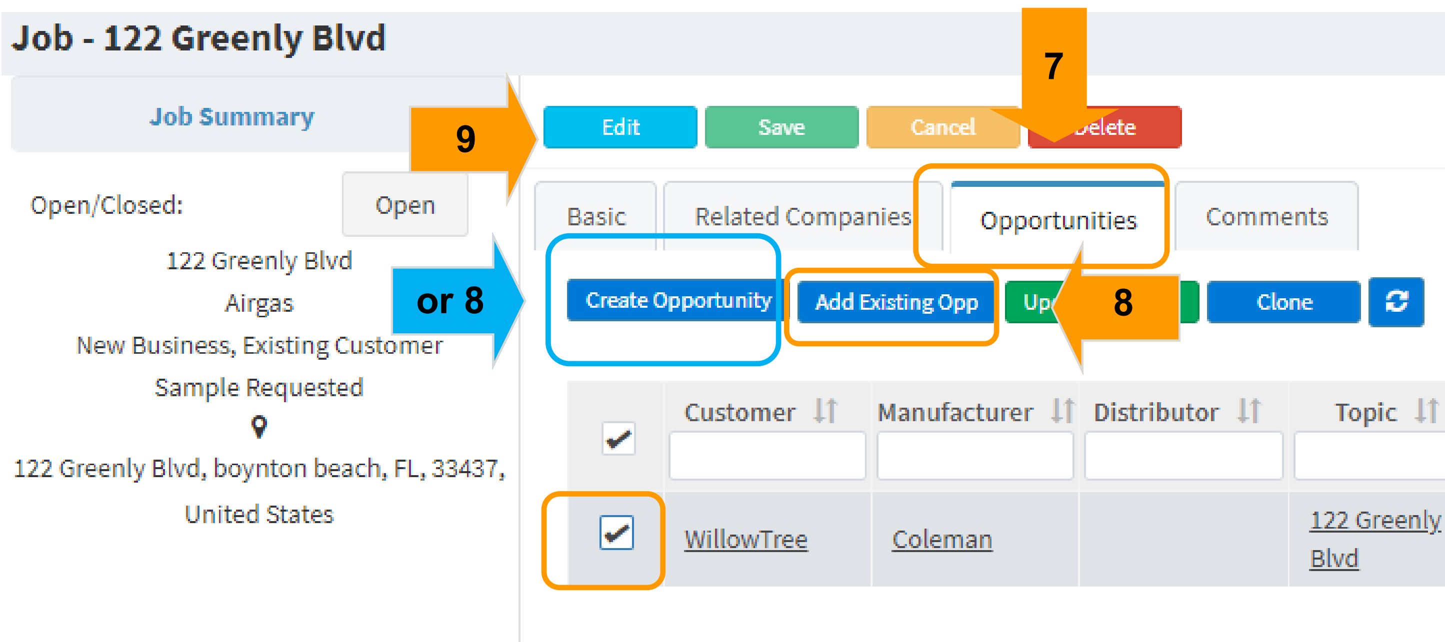
Add existing Opportunities to Jobs
Now that a job has been created, you can link existing opportunities or create new opportunities from within the Opportunities tab.

7. Left click the "Opportunities" tab
8. Left click the "Add Existing Opp" button
9. Place check mark next to opportunity you want to add to the job.

OR **Create a new opportunity**

8. Left click "Create" button then follow the instructions on page 76 of this workbook.

This image shows the job's "Opportunities" tab and "Create Opportunity" or "Add Existing Opp."

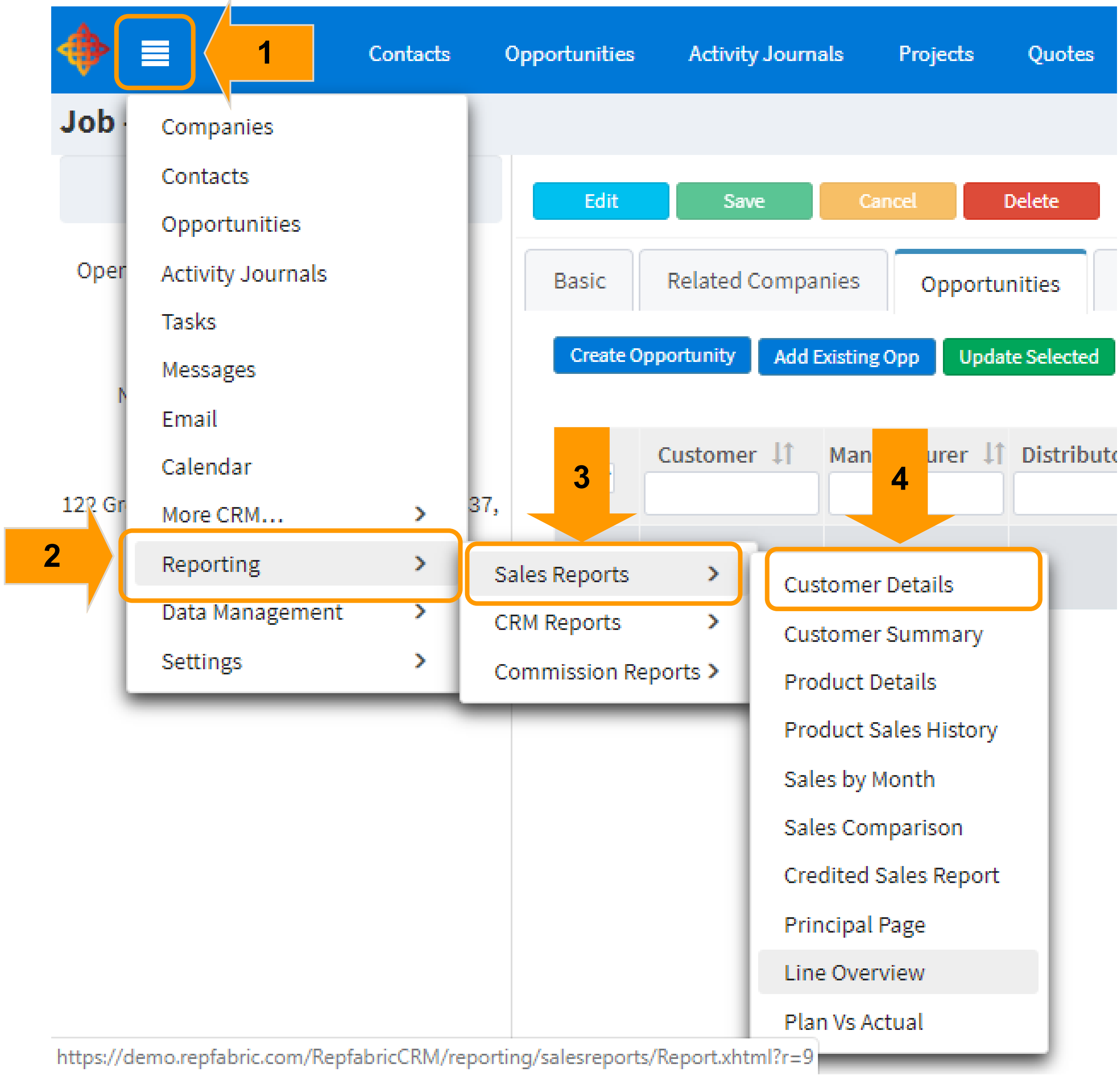


How to View Sales by Line at a Customer (web portal)

When you want to view current sales numbers at an account by line, you can do so both on the Repfabric web portal and on the mobile app. This tutorial shows you how to view sales at a specific account using the "Sales Report" by "Customer Details."

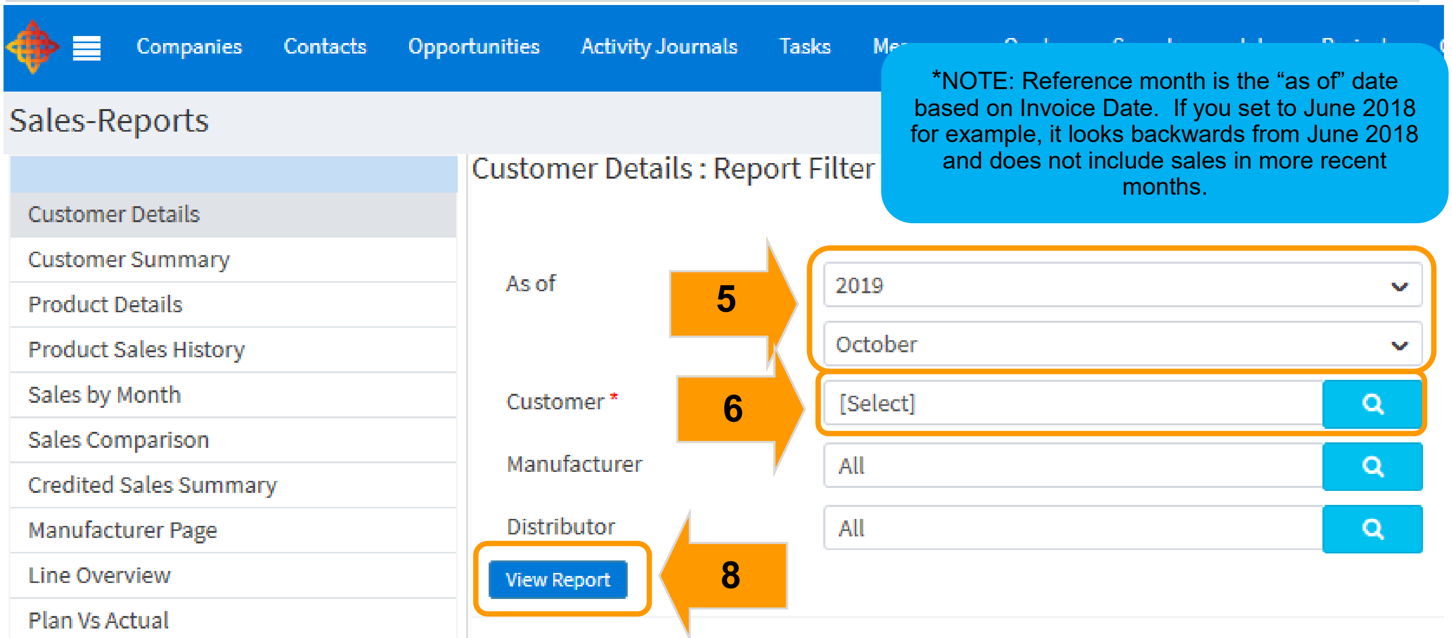
1. Left click global menu.
2. Hover over "Reporting."
3. Hover over "Sales Reports."
4. Slide down and left click "Customer Details"

This image shows the global menu, "Reporting", "Sales Report" and "Line Overview."



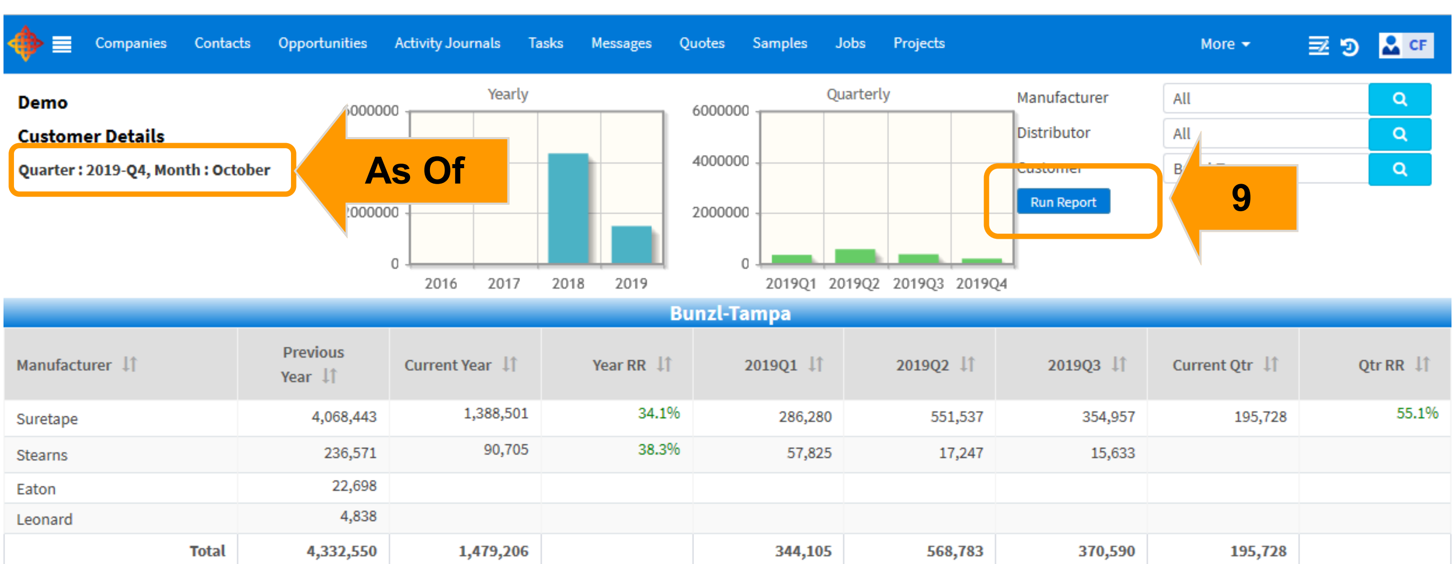
5. Set the reference Month and Year
6. Use the inspector icon to select the account on which you want to run the report.
7. Add any additional filters
8. Left click "View Report".
9. If you want to change a filter, simply make your changes and click "Run Report."

This image shows the Customer Details Selection Screen



Graphs show the annual sales and the quarterly sales for the most recent quarters

- **Previous Year** Sales $s during the prior calendar year
- **Current Year** Sales as of the current calendar year
- **Year RR** Yearly run rate for the current year as a percentage of last years sales. 100% and above means your expected sales for the remaining part of the year will be higher than the previous year.
- **20xxQx** Sales for the quarter listed
- **Current Quarter** Sales for the Quarter Selected for the Reference Month (As Of)
- **Qtr. RR** Percentage of the expected sales for the remaining portion of the quarter compared to the prior quarter.



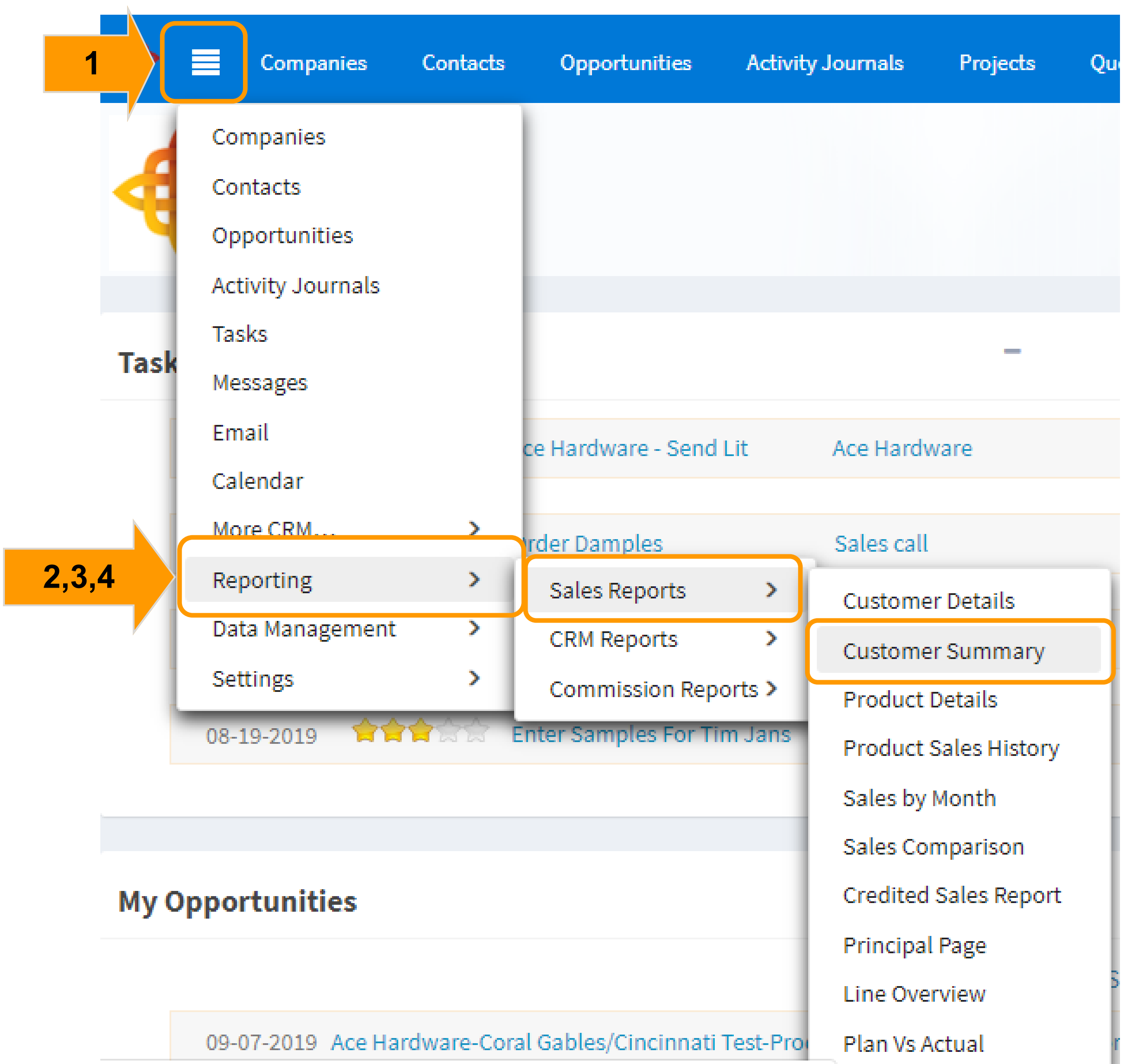
Manufacturer	Previous Year	Current Year	Year RR	2019Q1	2019Q2	2019Q3	Current Qtr	Qtr RR
Suretape	4,068,443	1,388,501	34.1%	286,280	551,537	354,957	195,728	55.1%
Stearns	236,571	90,705	38.3%	57,825	17,247	15,633		
Eaton	22,698							
Leonard	4,838							
Total	4,332,550	1,479,206		344,105	568,783	370,590	195,728	

How to View Sales for All of My Customers (web portal)

When you want to view current sales numbers at all of your customers, you can do so both on the Repfabric portal and on the mobile app. This tutorial shows you how to view sales at a for all of your assigned accounts using the "Sales Summary" report on the web portal.

1. Left click global menu.
2. Hover over "Reporting."
3. Hover over "Sales Reports."
4. Slide down and left click "Customer Summary."

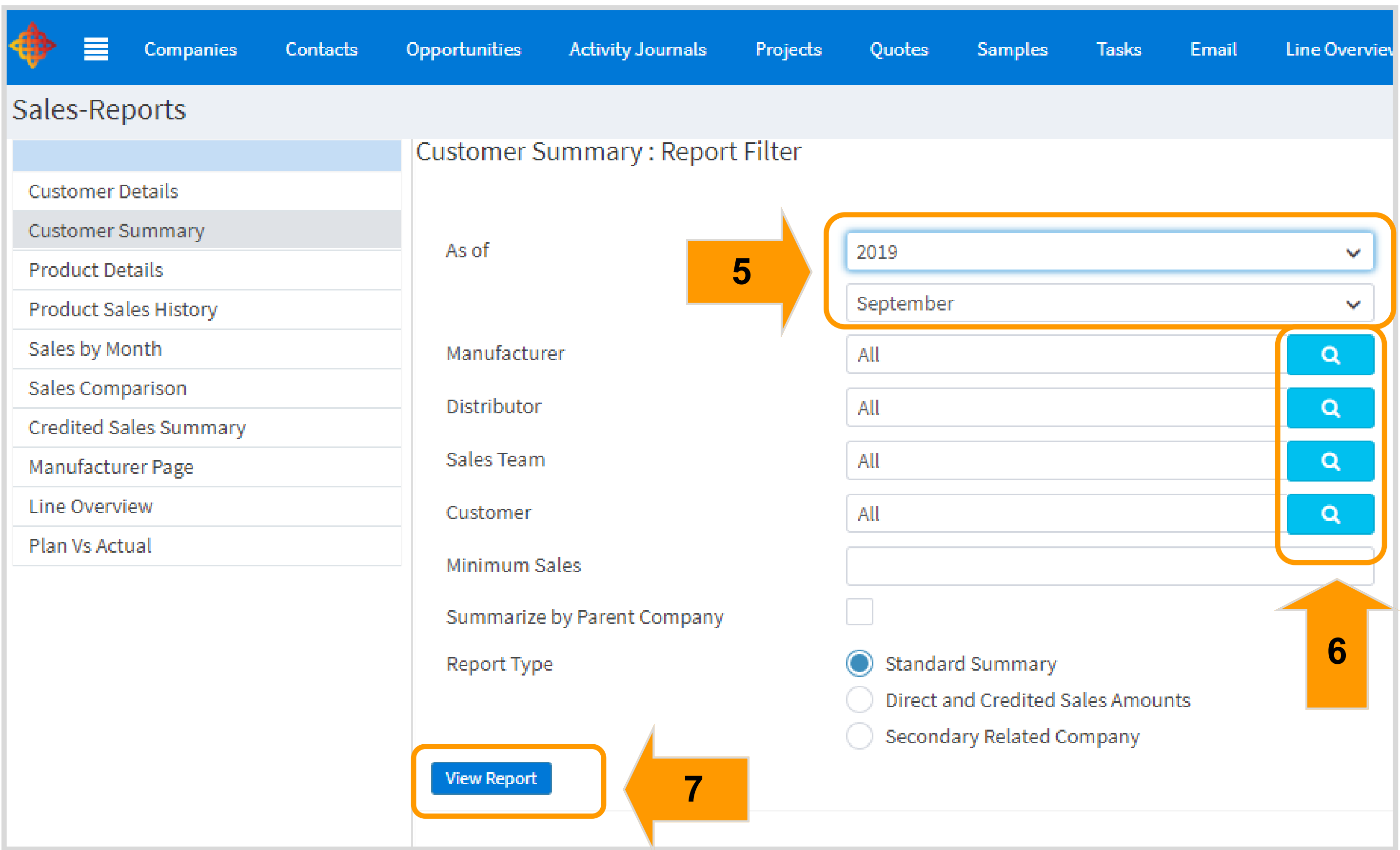
This image shows the global menu, "Reporting", "Sales Reports" and "Customer Summary."



5. Set the Reference Month and Year.
6. Select any filters using the magnifiers.
7. Left click “View Report.”

*NOTE: Reference month is the “as of” date based on Invoice Date. If you set to June 2018 for example, it looks backwards from June 2018 and does not include sales in more recent months.

This image shows how to narrow down the results of the report.

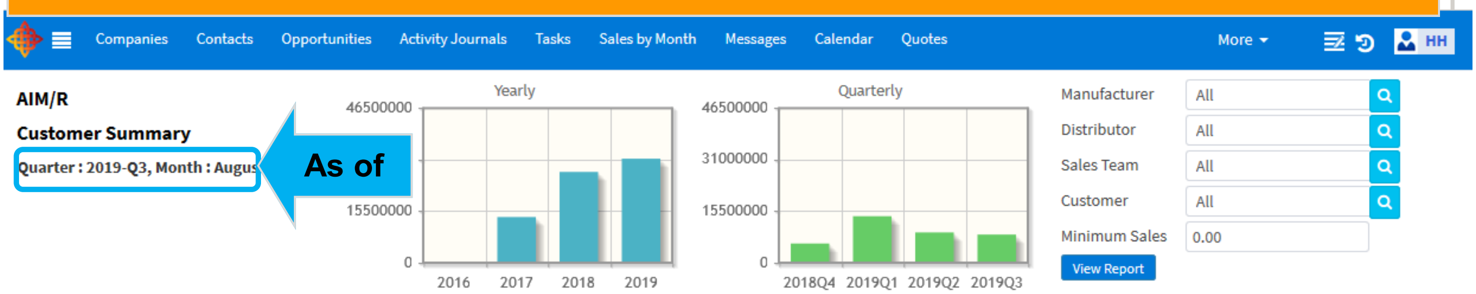


*Please note
- By checking “Summarize by Parent Company”, the report will roll up the sales dollars for all child customers under the parent company identified in the Company master record of the children accounts (such as customers or distributors with multiple locations).
- Direct and Credited Sales selection option shows the sales at one customer because of another customer due to internal / internal commission splits. This can be used for when both companies in the sales records are called on by two different sales people.

- Graphs show the annual sales and the quarterly sales for the most recent quarters
- **Previous Year** Sales $s during the prior calendar year using invoice dates
- **Current Year** Sales as of the current calendar year using invoice dates
- **% to LY** Sales so far this calendar year compared to last year's total sales based on invoice date. For example, as of Q3, Ferguson Orlando has done 120% of sales they did in 2017
- **20xxQx** Sales for the quarter listed based on Invoice Dates

8. Left click on any of the underlined numbers to drill down into the sales by line for that customer (Customer Details report for all lines).

This image shows the Customer Details Sales Report



Customer Name	Previous Year	Current Year (Actual)	% to LY
Ferguson - Orlando	15,563,440.38	18,777,145.77	120.65%
Ferguson - Orlando Showroom	3,543,197.86	4,381,197.12	123.65%
Hughes Supply - Orlando	4,332,550.38	3,493,086.42	80.62%
Johnstone Supply Tampa	1,868,363.62	2,167,787.73	116.03%
Hajoca Orlando	1,884,859.60	2,159,598.99	114.58%
Carr Plumbing Supply Inc		179,227.38	
Ferguson Waterworks - Orlando - Waterworks	8,299.56	4,259.64	51.32%
Ferguson - Fort Walton Beach		269.09	
Total :	27,200,711.40	31,162,572.14	

8

This concludes the instructions for this section.

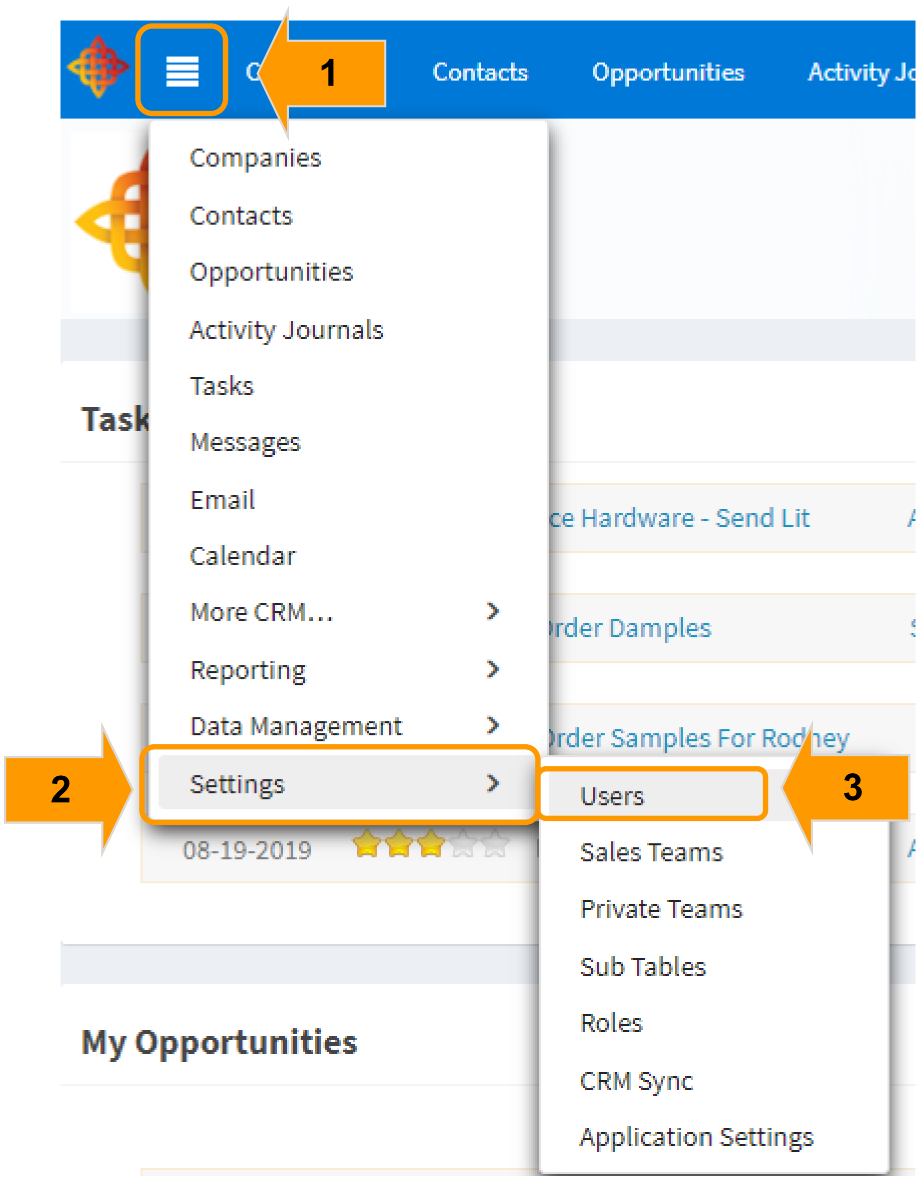
Troubleshooting when “You are not Authorized”

Repfabric restricts access to certain reports using the User Menu settings for your User Settings. When you do not have sufficient authorization to view a report in Repfabric’s Dashboard, you will receive an error message that “**You are not authorized to access this page**.” This tutorial explains how to fix your user settings to enable the report you want to view. Please contact your company administrator if you do not have sufficient authorization to modify your user menu settings.

User settings need to be updated for the user menu settings to enable the report you are trying to run:

1. Left click the global menu.
2. Hover over “Settings.”
3. Left click “Users.”

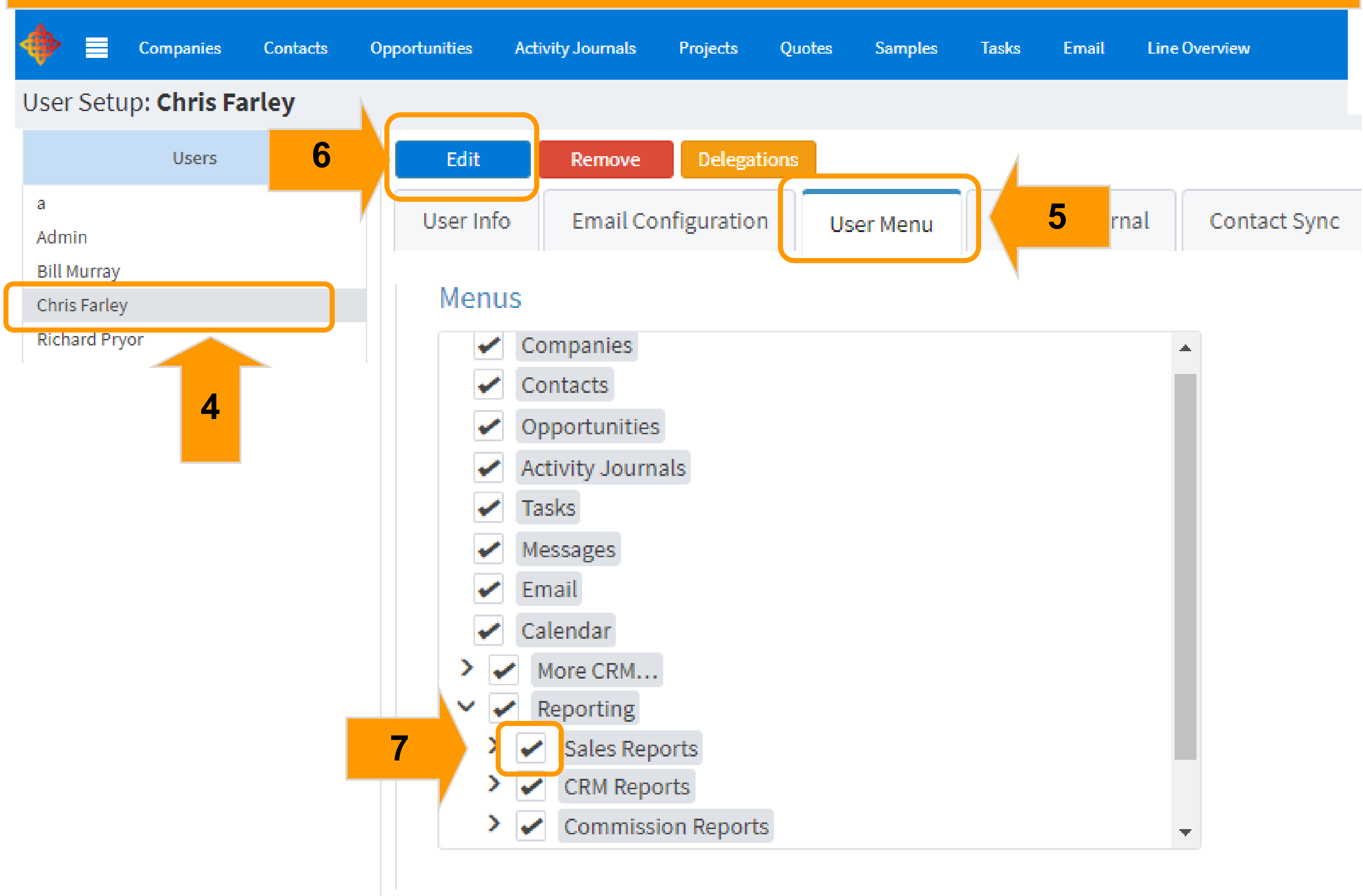
This image shows insufficient authorization to run a dashboard report.

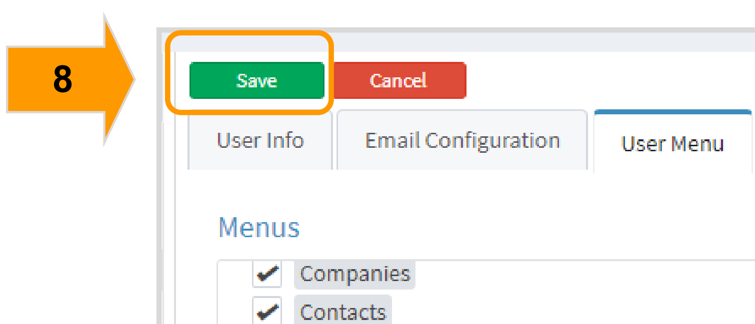


4. Left click the user name.
5. Left click the “User Menu” tab.
6. Left click the “Edit” button.
7. Left click the menu option (you may have to expand the menu selection and locate the screen you want to enable.
8. Left lick “Save.”

IMPORTANT: In order for the new settings to take effect, you must **Log out** and **Log In** again.

This image shows the User Setup Menu





This concludes the instructions for this section.

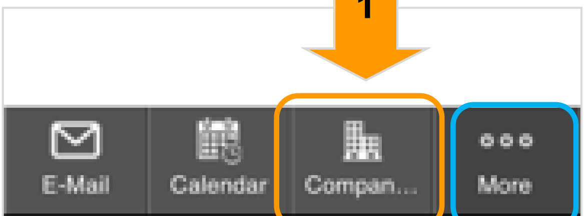
How to Review Sales by Company on Mobile App

You can lookup sales by company using the mobile app.

1. Tap “Companies.”
2. Tap desired company (scroll or use “Search” field to find desired Company).
3. Tap on the “$” icon to view sales figures.
4. Left click to choose the year you want to review.

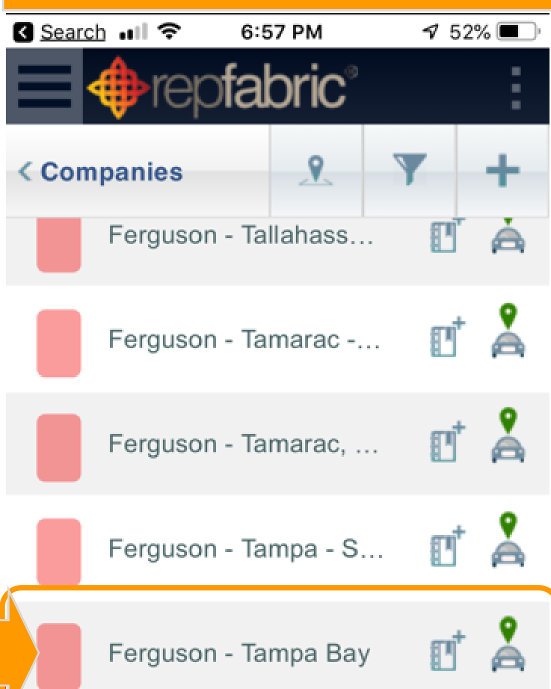
This image shows the “Companies” button.

1



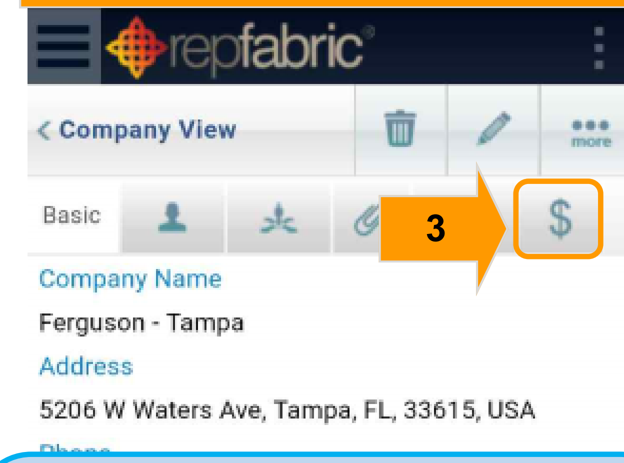
If you do not see the button you are looking for, tap “More” If you do not see any buttons. Tap the Repfabric logo to return to “Home” screen at any time.

This image shows a sample list of Companies.



2

This image shows the company detail screen.



3

- The current year sales are the dollars based on invoice dates.
- By default, the Sales by Line view will be shown for the company.
- By clicking on a line, you will drill into the part number level report for that line at this customer
- Use the “ … More “ button to see sales by product part number

This image shows sales by line for the year based on invoices

4

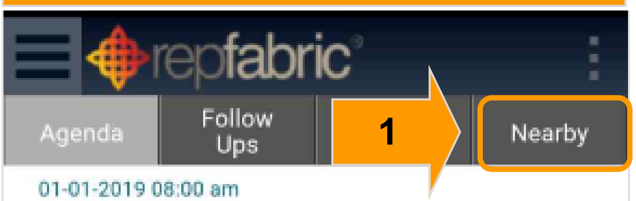
This concludes the instructions for this section.

How to Review Sales by Company from the Map on Mobile App

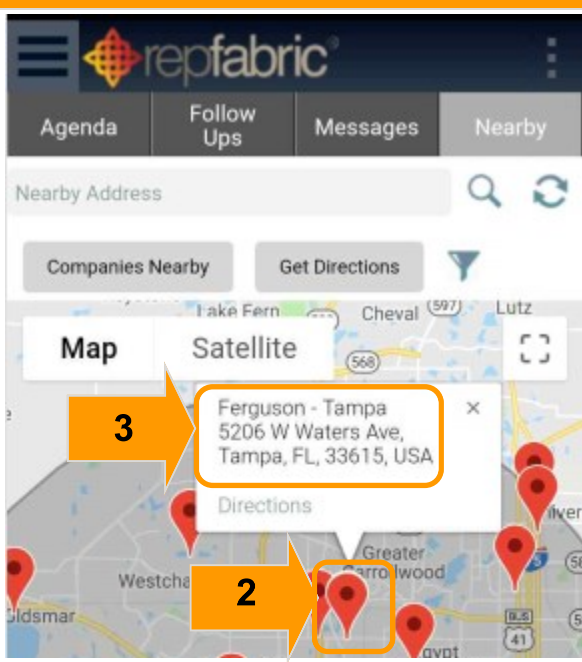
You can review the sales history at an account from the map view of the mobile app. If you want to access the Home screen, Tap the Repfabric logo.

1. Tap “Nearby” tab.
2. Tap on a pin to locate desired company.
3. Tap on the Company name label. This takes you into the Company Detail screen.
4. Tap on the “$” icon to view sales $.

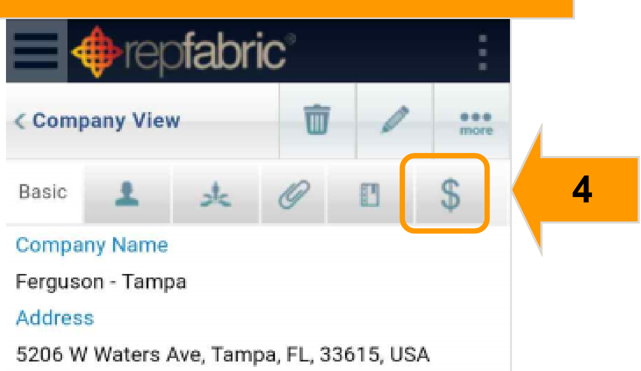
This image shows where to tap “Nearby”



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



This image shows the company detail screen.



This image shows sales by line for the year based on invoices

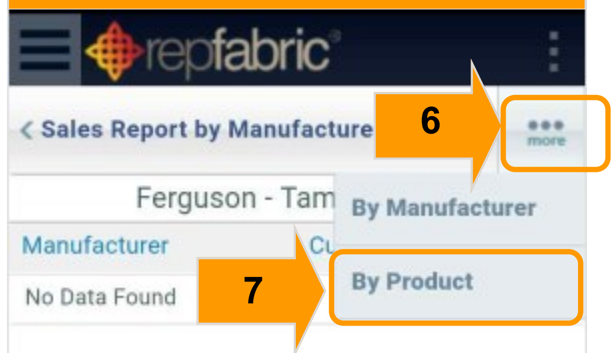
To view by part number

You can switch the view to show top part numbers or SKUs with comparisons to last year if your company loads part numbers into the sales and commissions module.

5. Left click to choose the year you want to review.
6. Left click "More."
7. Left click "By Product."

- The current year sales are the dollars based on invoice dates.
- By clicking on a line, you will drill into the part number level report for that line at this customer

This image shows Sales by Line screen



This image shows sales by line for the year based on invoices

This image shows Sales by Product

- The current year sales are the dollars based on invoice dates.
- Year RR means "run rate" or where you should expect sales to finish compared to last year's sales

This concludes the instructions for this section.

Sales Person 101 Workbook
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