

REFLEXIS INC.

REP MANAGEMENT QUICK GUIDE

PACE Central is the location for maintaining and managing the people and data in your organization. As the Administrator of your companies PACE Central site you have the responsibility of reporting on the data that has been collected by your reps in the field as well as managing their presence on the PACE Central site. This guide is designed to further educate you in the area of Rep Management. After reading this guide you will be able to:

- [Add a rep](#)
- [Delete a rep](#)
- [Assign stores, departments, divisions](#)
- [Add and remove divisions](#)
- [Assign a device](#)
- [Transfer a device](#)
- [Institute some Best Practices](#)

Adding a User (Rep)

As a rule, any member of your organization that will be assigned a device or will be a web entry user must be created under the “Reps” heading (see figure 1).

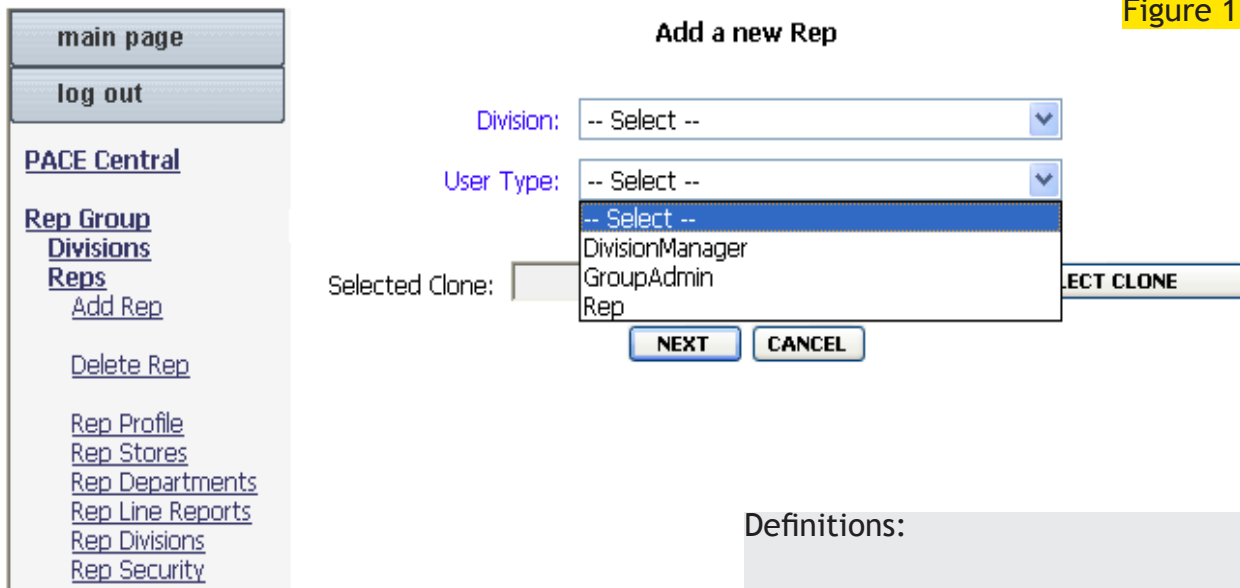


Figure 1

- To add a rep, select the ‘add rep’ link.
- Use the drop down arrow to select a division.
- Use the drop down arrow to select a user type.
- Select Next.

*The division you select will be the home or “primary” division for the rep. A rep can be assigned to more than 1 division but can only have 1 “primary” division.

*Cloning allows you to quickly build a new Rep by taking advantage of data previously entered for another Rep. Cloning is not a total transfer of data from the clone to the Rep being modified - only the items you choose to apply are used to update the Rep being modified.

Definitions:

User Type - The user type selected will determine the level of access the Rep will have when logged into the PACE Central web site.

Division Manager - Has limited access to the site based on the Division Manager permission. This permission is configurable.

Group Admin - This user type can perform any and all website actions.

Rep - This user type is restricted, by default, to generating reports containing his/her work only.

Upon selecting 'Next' you are taken to the Rep Profile screen (see Figure 2).

- Insert the first and last name of the user. (required fields).
- If the user is going to be a rep, issue him/her Standard Service from the rep area field. A manager should be issued Standard Service and Management from the rep area field.
- The remaining fields (Address, City, Telephone, email, etc.) are not required but recommended.
- Select Next.

Rep Profile

Figure 2

Division: 29: EAL(Midwest)	Rep Group: E.A. Langenfeld	User Type: Rep
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First Name:

Last Name:

Primary Language:

Rep Areas:

None
 Standard Service
 Management
 Reset Team
 New Store
 Millwork Culling

Address:

City:

State/Province:

Zip Code:

Telephone:

Business Telephone:

Address information is sometimes used as a point of contact for shipping product to the rep. Please verify the accuracy of this information whenever possible.

The next step is to assign stores to the user (see Figure 3). The stores assigned here will be the stores the user will have available to him/her. The user will only have access to the stores that you have assigned to them.

- Tap the ‘Select Stores’ button.
- The store list window appears. Select the store(s) you want to assign. (Hold down your CTRL key to select individual stores. Use your Shift key to select a block of stores.)
- Once you have made your selection(s), Tap the ‘Assign Stores’ button.
- Tap ‘Next’ to proceed.

Rep Stores **Figure 3**

Rep: Eric Toomas
 Division: 29: EAL (Midwest)
 Rep Group: E.A. Langenfeld
 User Type: Rep

All Stores

SELECT STORES

REMOVE STORES

1 - Corporate : E.A. Langenfeld

Selected Clone:

APPLY CLONE

NEXT **DONE** **CANCEL**

Select Stores To assign to Rep

1907 - NILES : THD-ISSI
 1908 - BEDFORD PARK : THD-ISSI
 1909 - CALUMET CITY : THD-ISSI
 1911 - CICERO, IL : THD-ISSI
 1912 - NORTH AVENUE : THD-ISSI
 1913 - RANDHURST : THD-ISSI
 1914 - DAN RYAN : THD-ISSI
 1916 - DOWNERS GROVE : THD-ISSI
 1917 - GLENDALE HEIGHTS : THD-ISSI
 1918 - NAPERVILLE : THD-ISSI
 1919 - NORTHLAKE : THD-ISSI
 1920 - CRYSTAL LAKE : THD-ISSI
 1921 - GENEVA : THD-ISSI
 1922 - GURNEE : THD-ISSI
 1926 - DEERFIELD : THD-ISSI
 1927 - PALATINE : THD-ISSI
 1928 - ROCKFORD : THD-ISSI
 1932 - MATTESON : THD-ISSI
 1934 - ELGIN : THD-ISSI
 1935 - CHICAGO RIDGE : THD-ISSI

ASSIGN STORES **CLOSE**

*Checking the ‘All Stores’ box will assign all the stores within the reps division.

*To remove a store, highlight the store(s) and tap the ‘remove stores’ button.

This is the Rep Departments screen (see figure 4). From this window you will assign departments to the rep. Departments are used to define how questionnaires are categorized on the PDA. The departments field, by default, contains all of the available departments. If you want to remove a department, highlight the department and select the 'Remove Departments' button. Tap 'Next' to proceed.

Rep Departments

Figure 4

Rep: Eric Toomas	Division: 29: EAL(Midwest)	Rep Group: E.A. Langenfeld	User Type: Rep
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SELECT DEPARTMENTS	<div style="border: 1px solid black; padding: 5px;"> CMAP : THD-ISSI D29 : THD-ISSI D29 : THD-ISSI D29 CLASSES : THD-ISSI MAP : THD-ISSI Miscellaneous : THD-ISSI Out of Service : THD-ISSI POP : THD-ISSI Resets : THD-ISSI RTV : THD-ISSI </div>
REMOVE DEPARTMENTS	

Selected Clone:	<input type="text"/>	SELECT CLONE
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APPLY CLONE

NEXT	DONE	CANCEL
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Rep Line Reports are only valid for Reps having been created with the User Type “Rep”. Line reports (see figure 5) are used to allow a specific Rep to view and even manage a group of Reps under their charge. A rep that has been assigned Rep line reports will be able to view their own work and the work of any of their line reports. If you do not want to assign line reports, tap the ‘Next’ button. To assign Rep line reports:

- Tap the ‘Select Reps’ button (see figure 5)
- Select the division (see figure 6)
- Tap the ‘Select reps’ button and select the rep(s) (see figure 6)
- Tap the ‘assign reps’ button
- Tap ‘Next’ to proceed

Figure 6

Select Division:

Rep Line Reports

Figure 5

Rep: Eric Toomas	Division: 29: EAL(Midwest)	Rep Group: E.A. Langenfeld	User Type: Rep
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<input type="button" value="SELECT REPS"/>	Toomas, Eric - (P, 29: EAL)
<input type="button" value="REMOVE REPS"/>	

Selected Clone:

This is the Rep Security page (see figure 6). From this page you need to issue a permission mask to the rep.

- Select the drop down arrow within the ‘permissions’ field.
- Assign the ‘Default Rep Permission’ *
- Select ‘Done’

From this page you can also change permissions and view and/or update passwords. The user name and password fields pertain to website access for this rep. The device user name and password determine access to the envision software on the device (pda). The rep ID and modem username are used to identify the rep when he/she is connecting and synchronizing the device. All user names, passwords and ID’s are automatically generated by the system upon creation of the user.

Rep Security

Rep: Eric Toomas	Division: 29: EAL (Midwest)	Rep Group: E.A. Langenfeld	User Type: Rep
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User Name: Eric_Toomas52275

Password:

Device User Name: Eric Toomas

Device Password:

Rep ID: 98659

Modem Username: ISSI_EAL_98659

Permissions:

-- Select --

EAL - Default Division Manager Permissions

EAL - Default Rep Permissions

etn- Customer Support

PT DM Permission Mask

*The user type ‘Rep’ overrides any permission assigned to a user. Ex: You create a user as a ‘Rep’ user type and assign the user the ‘Default Division Manager Permission’. This higher level permission will not afford the user any greater access. The user type of ‘Rep’ will override any assigned permission.

The next step is to publish this information. Publishing is the process of delivering the new and/or altered profile information to the device (PDA). This is a very important step that is often forgotten. Follow the steps (see figure 7) to publish.

1. Select the 'Publish to Device' link.
2. Select the 'Rep Profiles' button.
3. Select the division(s).
4. Select the 'Publish' button.

The files will begin processing. When the files are finished processing the status window will disappear.

Publish Data Files To The Device

Figure 7

2.

3.

4.

5.

- [Rep Group](#)
- [Divisions](#)
- [Reps](#)
- [Schedules](#)
- [Web Site Users](#)
- [PACE Advance](#)
- [Project Tracker](#)
- [Sheet Designer](#)
- [Sheet Deployment](#)
- [Permissions](#)
- [1. Publish to Device](#)
- [Online Sheets](#)
- [Vendor Service Levels](#)

Divisions to Publish:

3.

4.

Rep Group	Division	Publish Type	Status
29:	EAL(Midwest)	Rep Profile Files	Waiting to Process
29:	EAL(Midwest)	Rep About Files	Waiting to Process
29:	EAL(Midwest)	Rep Profile Files	Waiting to Process
29:	EAL(Midwest)	Rep About Files	Waiting to Process

Status Window

Assigning a Device (PDA)

The new rep you created now needs a tool to perform work in the field. The tool is a PDA and each rep working in the field has a uniquely assigned PDA. All work done on the PDA will be attributed to the username on the PDA. If the user is going to use web entry, their website username and password will be the identifier. Follow the steps to assign a device to a rep.

- [Rep Group](#)
- [Divisions](#)
- [Reps](#)
- [Add Rep](#)
- [Delete Rep](#)
- [Rep Profile](#)
- [Rep Stores](#)
- [Rep Departments](#)
- [Rep Line Reports](#)
- [Rep Divisions](#)
- [Rep Security](#)
- [Switch Divisions](#)
- [Assign To Rep](#)

Assign Devices To Reps

Division:
 -- Select --
 29: EAL(Midwest)
 Test

Device Service Tag Number:

Rep:

2. Select the Division of the rep receiving the device.

1. Select the 'Assign to Rep' link.

Assign Devices To Reps

Division:

Device Service Tag Number:

Rep:
 -- Select --
 Accetta, Kortland - (P, 29: EAL)
 Arnett, Cecil - (P, 29: EAL)
 Bade, Richard - (P, 29: EAL)

3. Select the Device number (PDA) you are going to assign to the rep.

4. Select the Rep receiving the device and click the 'Update' button. Publish the changes.

Deleting a User (Rep)

At some point you will need to remove a user from the system. Deleting a user from the system is not difficult but there are steps you need to follow. Prior to deleting a user remove all the stores assigned to that user. If the user still has a device assigned to them at the time of deletion, that device ID will be returned to the assign pool for assignment to another user.

- Select the 'Rep Stores' link.
- Using your mouse, highlight all the stores.
- Select the 'Remove Stores' button.
- Select the 'Save' button to save the changes.
- Select the 'Delete Rep' link.
- Select the reps 'Division' (see figure 8)
- Select the 'Select Rep' button (see figure 8)
- Select the rep to be deleted.
- Select the 'delete' button.

Rep Stores

Rep: Eric Toomas	Division: 29: EAL(Midwest)	Rep Group: E.A. Langerfeld	User Type: Rep
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All Stores

SELECT STORES

REMOVE STORES

- 1908 - BEDFORD PARK : THD-ISSI
- 1909 - CALUMET CITY : THD-ISSI
- 1911 - CICERO, IL : THD-ISSI
- 1912 - NORTH AVENUE : THD-ISSI
- 1913 - RANDHURST : THD-ISSI
- 1914 - DAN RYAN : THD-ISSI
- 1917 - GLENDALE HEIGHTS : THD-ISSI
- 1918 - NAPERVILLE : THD-ISSI
- 1919 - NORTHLAKE : THD-ISSI
- 1 - Corporate : E.A. Langerfeld

Selected Clone:

SELECT CLONE

APPLY CLONE

SAVE

CANCEL

Figure 8

Division:

-- All --

29: EAL(Midwest)

Test

Selected Rep:

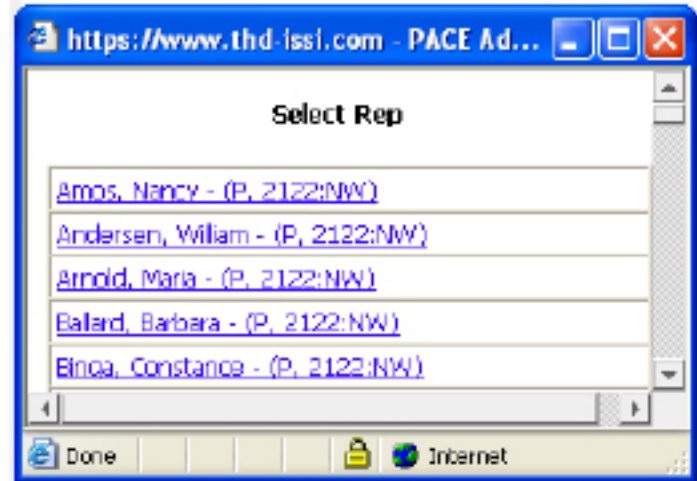
Toomas, Eric - (P, 29: EAL)

SELECT REP

Adding and removing divisions

Some reps are responsible for stores that reside in a division outside their ‘primary’ (home) division. For example, a rep has the Northwest as his ‘primary’ (home) division He is also responsible for stores that reside in the Pacific division. You will need to add the Pacific division to this reps profile and the following steps will show you how.

- [Rep Group](#)
- [Divisions](#)
- [Reps](#)
- [Add Rep](#)
- [Delete Rep](#)
- [Rep Profile](#)
- [Rep Stores](#)
- [Rep Departments](#)
- [Rep Line Reports](#)
- [Rep Divisions](#)
- [Rep Security](#)
- [Switch Divisions](#)



1. Select the ‘Switch Divisions’ link

4. Select the Rep name.

Division:

Selected Rep:

2. Select the Division.

3. Click the ‘Select Rep’ button.

Rep Switch Divisions

Rep: Eric Toomas	Division: 21/22: CMK(Northwest)	Rep Group: Crossmark	User Type: Rep
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21/22: CMK(Northwest)

To remove a Division you would highlight the Division from this window and select the ‘Remove Divisions’ button. Save the changes. Publish the changes to the device.

5. This window shows the divisions assigned to the user. Choose the ‘Select Divisions’ button and choose the division you want to add. Save your changes. Publish the changes to the device.

Transferring a device

If you have a rep leaving your organization or moving into a role that does not require the use of a PDA, you may find it necessary to remove the device assigned to them and reassign it to another user. The process of taking a device from one user and issuing it to another user is called Transferring. The following steps will show you how to transfer a device.

Transfer Device From One Rep To Another

Rep Group

Divisions

Reps

[Add Rep](#)

[Delete Rep](#)

[Rep Profile](#)

[Rep Stores](#)

[Rep Departments](#)

[Rep Line Reports](#)

[Rep Divisions](#)

[Rep Security](#)

[Switch Divisions](#)

[Assign To Rep](#)

[Change User Type](#)

[Transfer Device](#)

From:

29: EAL(Midwest)	Adamski, John (EAL373AC4C)
29: EAL(Midwest)	Atwood, Joseph (EALC952696)
29: EAL(Midwest)	Barschow, Dennis (EALA241A4B)
29: EAL(Midwest)	Bartlett, Jonathan (EAL33C0E75)
29: EAL(Midwest)	Becker, Gene (F8L8R31)
29: EAL(Midwest)	Beckum, James (EALCD99F9D)
29: EAL(Midwest)	Bentley, Gillian (EALA454837)
29: EAL(Midwest)	Berry, John (EALC4707)
29: EAL(Midwest)	Bianchi, Nicholas (EAL4A9AAEF)
29: EAL(Midwest)	Biewer, Scott (EAL7A1420B)
29: EAL(Midwest)	Bloom, Harvey (EALC1E2A73)
29: EAL(Midwest)	Bondar, Kathleen (EAL3327F9F)
29: EAL(Midwest)	Bounds, Jermaine (BFL8R31)
29: EAL(Midwest)	Bradley, Gregory (H9L8R31)
29: EAL(Midwest)	Broer, Scott (EALC20F948)

To:

29: EAL(Midwest)	Accetta, Kortland
29: EAL(Midwest)	Arnett, Cecil
29: EAL(Midwest)	Bade, Richard
29: EAL(Midwest)	Batone, Anthony
29: EAL(Midwest)	Bowker, Tom
29: EAL(Midwest)	Centanni, James
29: EAL(Midwest)	Coy, Mike
29: EAL(Midwest)	Demming, Thomas
29: EAL(Midwest)	DePrins, Edward
29: EAL(Midwest)	Dolan, Corinne
29: EAL(Midwest)	Dominguez, Ricardo
29: EAL(Midwest)	Faughner, Van
29: EAL(Midwest)	Fleischmann, Paul
29: EAL(Midwest)	Fushia, Jeff
29: EAL(Midwest)	Gerstel, Bob

* The rep receiving the device must have an existing profile on the website prior to transferring.

1. Select the 'Transfer Device' link.
2. Select the user that is having the device is removed (From).
3. Select the user that is receiving the device (To).
4. Click the 'Transfer' button.
5. Publish the changes.

There are no “set in stone” rules that dictate how you should manage your field force but there are some best practices for managing your field force.

1. A Division Manager should be assigned Standard Service and Management from the Rep Area field.
2. A rep user type cannot be changed from the website (this applies to both rep and DM user types). There are two options;
 - a. Contact Reflexis Tier2 to make this change.
 - b. Create a new profile, transfer the device then delete the previous profile.
3. Deleting a rep does not delete the history of the rep. The work previously performed by the rep will remain available for reporting (be sure the “inactive” rep filter is selected).
4. For the purpose of accurate reporting and optimal PDA performance, it is not advisable to assign “all” stores to a rep.
5. If you have a rep that is no longer employed by your company and you want to keep the device available for a new employee you have several options:
 - a. Contact Reflexis Tier2 to unassign the device. The device will then be in your available pool for future assignment.
 - b. Create new profile (name = “available”), transfer the device then delete the previous profile.
6. Instruct your reps to synchronize their devices daily to ensure their work is delivered and to receive device updates.
7. If your company is using smartphones, please do not return the devices to the carrier for repair. Instruct your reps to contact the customer support department @ Reflexis for assistance.
8. Do not change the name in a users profile. A name change will cause the loss of all history for that rep.