Sales Force Automation Manual

Version – 1.0.0.87

Get Started

Step 1 - **Download Mobile App**

1. Enter **User ID**   –   Registered Email id
2. Enter **Password**   –   123456
3. Click on **Get Started**
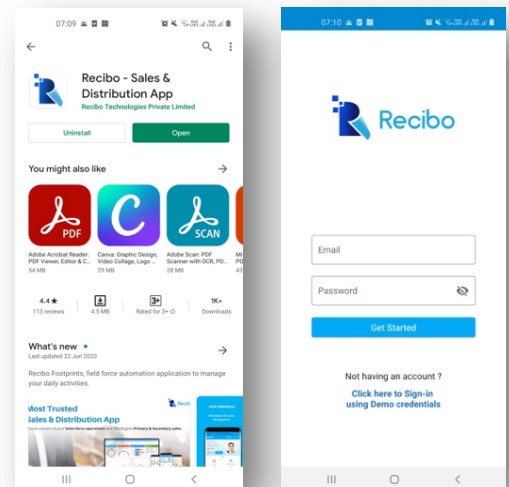
Click here

Important

- **Do not click on Sign-in using Demo credentials as it is meant for Demo purpose**
- **Registered email ID is the email id which has been shared with your company.**

Step 2 – **Mobile App Permission Access for Login.**

1. Allow Auto start from App permissions
2. Click on **allow** for **Device Location** per mission
3. Click on **allow** for Photo capture permission
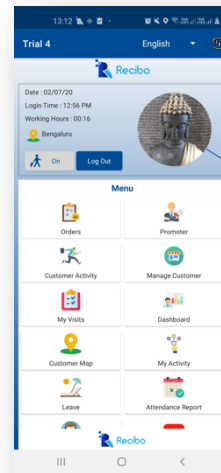4. Click on **allow** for stopping Battery Optimization

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Step 3 – Capture Selfie Attendance

1. Click on Login Tab to Capture Selfie
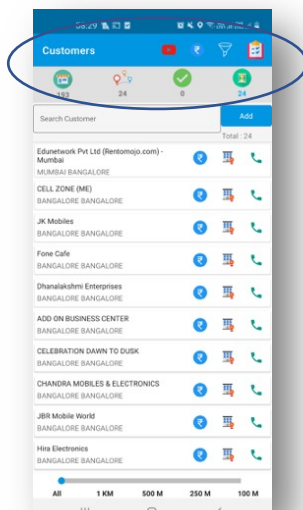2. Click on Sync once if Attendance Syncing is not completed

Sync Attendance

Selfie Attendance

Order Management

Total Stores

Scheduled Stores

Completed Visit

Pending Visit

Payment Collection

Mark Visit/ Check-in

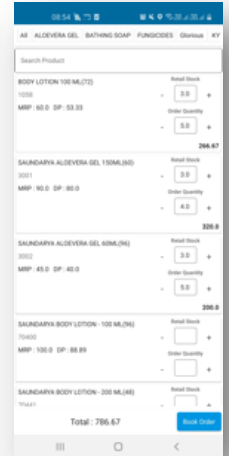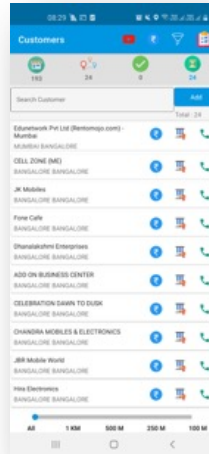**Tele - Order**

Order Summary

Route Filter

App Demo

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Steps to Book Order

1. Click on Store to open Product List
2. Enter Retail Stock & Order Quantity with Scheme
3. Check Order quantity and update
4. Click on WhatsApp icon to share to Retailer/ Distributor
5. Mark Visit / Check-in if store is closed.

Important

Mark Visit/Check-in is mandatory if Order is not captured for the store

Click on Tele-Ordering icon for placing an Order directly from Telephone

Click on WhatsApp icon for sharing order directly to Retailer / Distributor
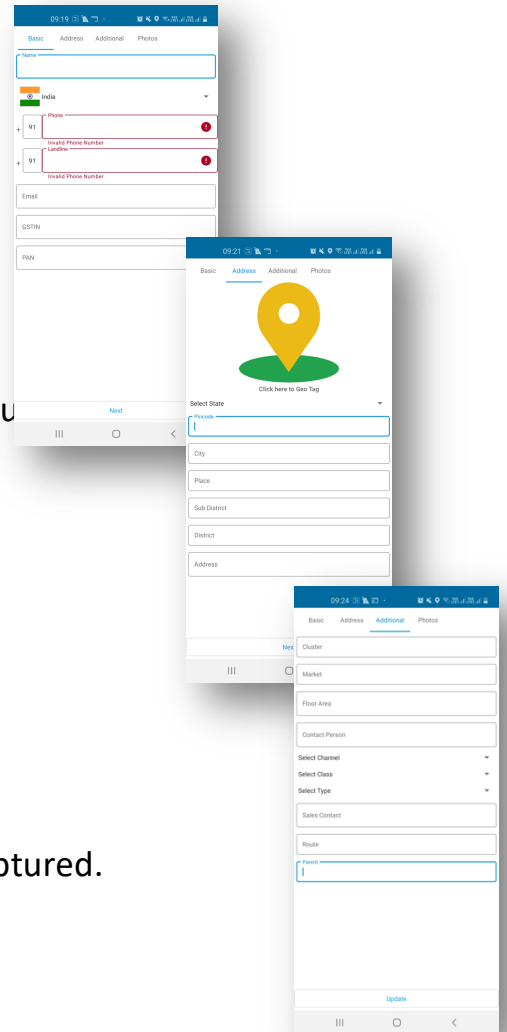
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![store icon] **Manage Customer**

Steps to Add a New Store

1. Click on Add Store in Manage Customer
2. Enter Outlet details
3. Click on location icon to Geo Tag
4. Select Channel, Customer Class & Customer Type
5. Select CFA/Super Stockiest /Distributor/ Sub-Distribu[tor] name in Parent.
6. Upload Store Building Facade Photos
7. Click on Sync button

Steps to Edit existing Store

1. Click on store name in Manage Customer
2. Edit Store details
3. Click on location icon incase Geo tagging to be recaptured.
4. Select Channel, Class, Type & Map with Parent Firm
5. Upload Building facade Photos
6. Click on Sync button

Important

- **Geo** tagging of Store to be done at Store location only.
- **Route** names to be properly mentioned to avoid duplication is Route creation.
- **Parent** Mapping – Correct mapping the Retailer with respective Distributor is Mandatory for assigning the orders
- **Sync** your store to reflecting in Ordering Module for Booking Order.

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Supervisor Functionalities - Joint Market Working

   My Activity

1. Go to My Activity on Mobile App
2. Select Activity Type from Drop Down
3. Tag employee for Joint working
4. Click on Start Activity
5. Go to Order Module / Customer Activity
   Module to Check all the stores/ Market/Beat
   of tagged for additional Order booking or input of
   Market work observations
6. Capture Feedback or Remarks
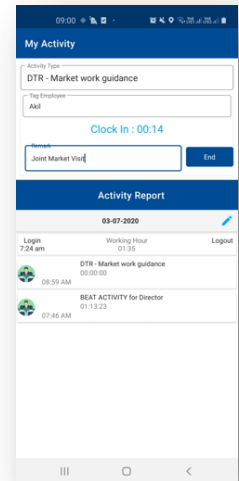
Important

- **Tagging** of Employees will give you access to Book Orders for the stores assigned to the respective employee.
- **Supervisors** can input Store Observations/Display / Competition tracking in **Customer Activities Module**
- Login to **Web Software** to check Supervisor activity reports.

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Customer Activities

Track Competition Activity/Merchandising/Display Audit/ Survey

1. Go to Customer Activity
2. Click on Store name
3. Select Activity type from drop down
4. Start the activity
5. Input Activity Details in the Form
6. Capture Feedback or Remarks
7. Click on image icon for uploading pictures
8. End activity
9. Mark Visit/Check-in is Mandatory Incase Store is Closed

Important

Mark Visit/Check-in is mandatory if Order is not captured for the store

Click on WhatsApp icon for sharing activities in PDF or Text

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Mobile Dashboards

1. **Insights Dashboard**
   Get real time updates on Target Vs Ach
   for each employee with Balance to ach

2. **Productivity Dashboard**
   Daily Market coverage updates with indication
   on Total stores, Completed, Repeat Orders,
   Stock audit, New Outlets added etc
   Also get updates on
   LPSC (Avg lines per sales call)
   TLSD (Total lines per sales call)
   UOB (Unique outlets billed)

3. **Attendance Dashboard**
   Get real time updates on Daily logins,
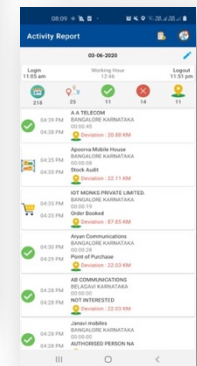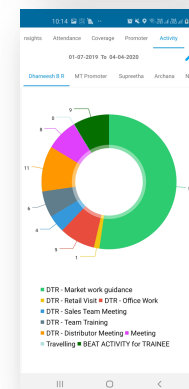   State wise / Designation wise attendance.
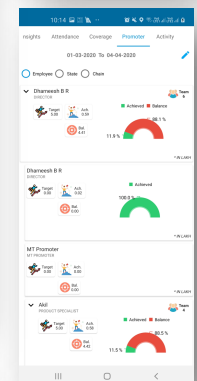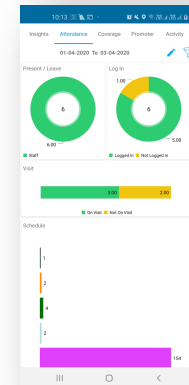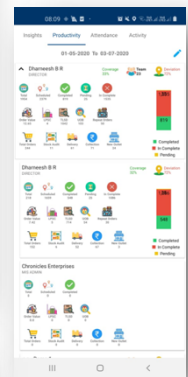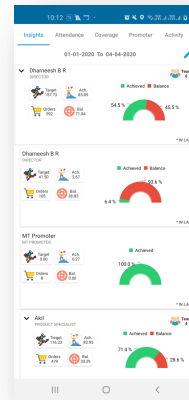
4. **Promoter Dashboard**
   Get updates on Promoter wise, State wise,
   Chain wise performance with
   MTD, M-1, M-2, M-3 growth charts

5. **Activity Dashboard**
   Get updates on Employee time spent
   in Market Visits, Office work,
   Distributor Meeting etc.

6. **Daily Visit Summary**
   Get Daily Store wise visit summary with end of the day order report.
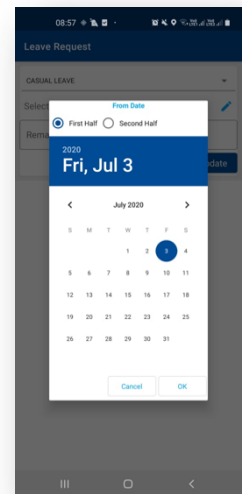
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Leave Management

Step 6 – Apply Leave

1. Select Leave type from Drop down.
2. Click on Pen icon to select Date range
3. Select leave **from date** on Calendar
4. Click ok
5. Select leave to date on Calendar
6. Click ok
7. Enter Leave reason in remark & update.
8. For Half day leave – Select From date & Click ok, select first half & click ok.
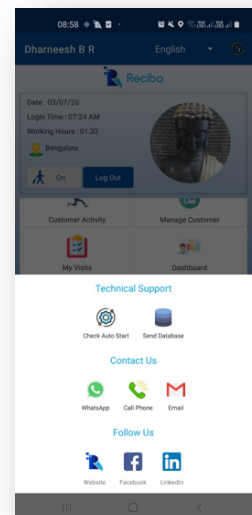9. Click on Attendance report to check daily working hour

Support

1. Click on WhatsApp to send msg to Recibo Support.
2. Click on Phone icon to call us directly.
3. Click on Send Database if your not able to explain us the problem

   Support Number - 8553-9553-33 /43
   Email – support@recibotech.com

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Frequently asked questions (FAQs)

1. Does Mobile App work offline without internet?

   a. Yes, Mobile App works offline without Internet. Only for Selfie Attendance internet connectivity is required. Sync & sign-out of App after-market working end of the day is mandatory if working offline.

2. I am not able to Download App from Google Play store

   a. App doesn't download if other Apps are in Queue for Download in Google Play store and has not been downloaded due to Internet Connectivity. In such case go to Google Play Store Settings and stop existing App downloads.

3. Can I work on Mobile App by turning off my GPS / Location ?

   a. No, Location/ GPS is mandatory for App to work as all the activity inputs are captured with Location coordinates & time stamp.

4. Does the battery drain out due to Mobile App ?

   a. No, Recibo App is just 4.6 MB, hence a very minimal battery power is required to sync the data. However GPS/Location has a standard battery consumption rate. Incase Mobile Phone has less battery capacity is suggested to carry a Power bank.

5. Is it possible to Geo Tag Store from a different Location?

   a. No, Its not possible to Geo tag a store from a different location. Geo tagging to be done in front of the store.

6. What should be the Mobile Phone Specification for using the Mobile App

   a. Recibo App works seamlessly on any Mobile Phone with Android Version 5 (Lollypop) and above.

7. Does the Mobile App work on Apple (IOS) phones ?

   a. Recibo Mobile App functionalities has been structured for real time data capture on Google Maps, WhatsApp, PDF, Gamifications etc hence the App works seamlessly on Android phones. Web App can be accessed on IOS for Dashboard/reports.

8. I logged out for the day, How can I relog in for same day.

   a. Once logged out there is no option for Re login for the same day. Dashboard and visit details can be checked.

9. Can I use same Phone numbers for creating multiple stores?

   a. No, Phone numbers has to be unique & duplication is not allowed which will lead to Sync error. It is suggested to input Store manager contact number incase Store has multiple branches.

Error Notifications & Trouble Shooting

1. **User ID & Password Mismatch** - Check your User ID from your admin team. User ID is your registered email id & default password is 123456.

2. **App already installed on other device with this User ID** - Mobile App is locked to be used in only one Device at a time. In case of any Mobile handset changeover contact your admin team to reset the device from backend.

3. **No Active Session Found** – This error is shown If the App is downloaded for more than 1 hour and not logged in. Please close the App completely from Phone history and try again. If problem persists uninstall the App and reinstall again.

4. **Attendance Not Synced** - Check your internet connectivity & Click on Sync icon. Still problem persists restart your phone once.

5. **Syncing data from Server. Please wait** - Check your internet connectivity is it is taking too long. Restart your phone once if problem persists.

6. **Something went wrong** - Enable your Auto start from Support module. If problem persists click on "Send database" and share it to Recibo support through WhatsApp.

7. **Validation Error** - Validation error is due to duplication of phone number or Customer code. Go to manage customer to edit the details. If problem persists reach out to admin team.

8. **Other Error Messages** – If you have any other error messages, WhatsApp the screen shot to Recibo Support.

Click here for Support