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Overview

Welcome to the Retail Engagement Program (REP). This system is designed to provide the tools and resources needed to represent Microsoft in retail stores worldwide.

The REP system has two parts. There is a website Portal that has reporting of completed call reports, training activities and even the photos captured in the stores. The second part is the Windows Application that contains:

- Training resources to learn about new Microsoft products and services
- Store Visit Call Reports for daily in-store activities
- Event Call Reports to record 1:Many training events
- Word on the Street Call Reports for capturing competitive information, customer and RSP feedback.

Getting Started

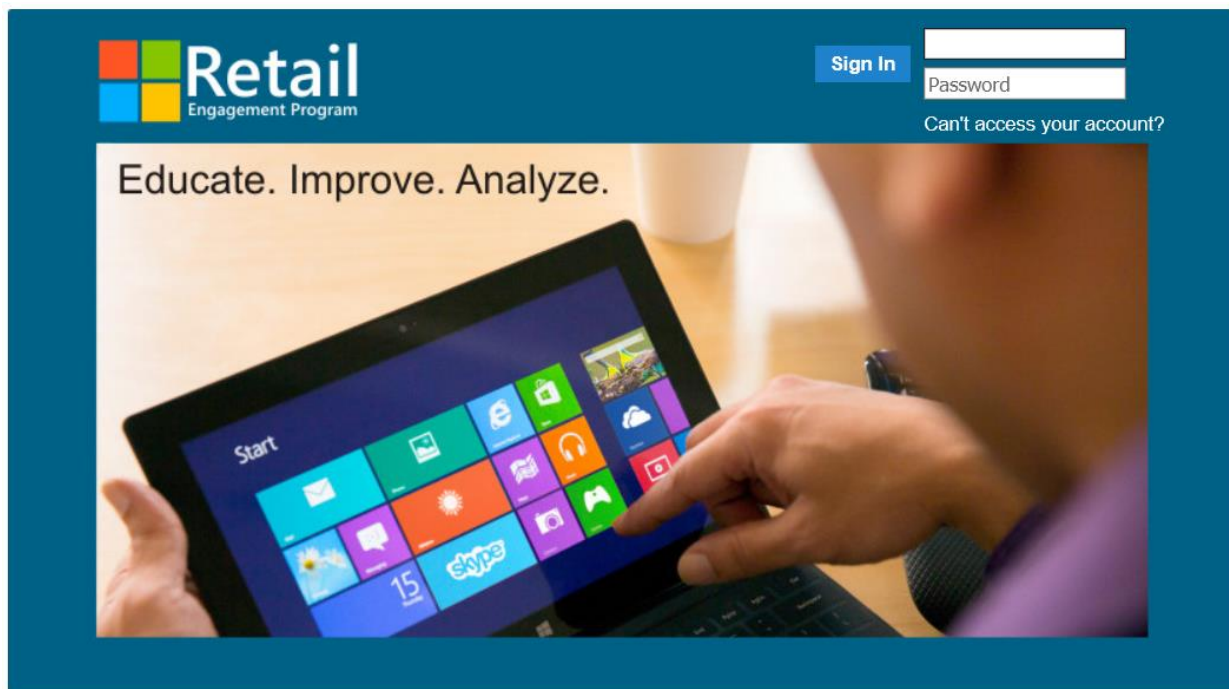
Before using the REP application on a Windows device, the REP website must be accessed to obtain a unique 10 digit ID number.

Website Login

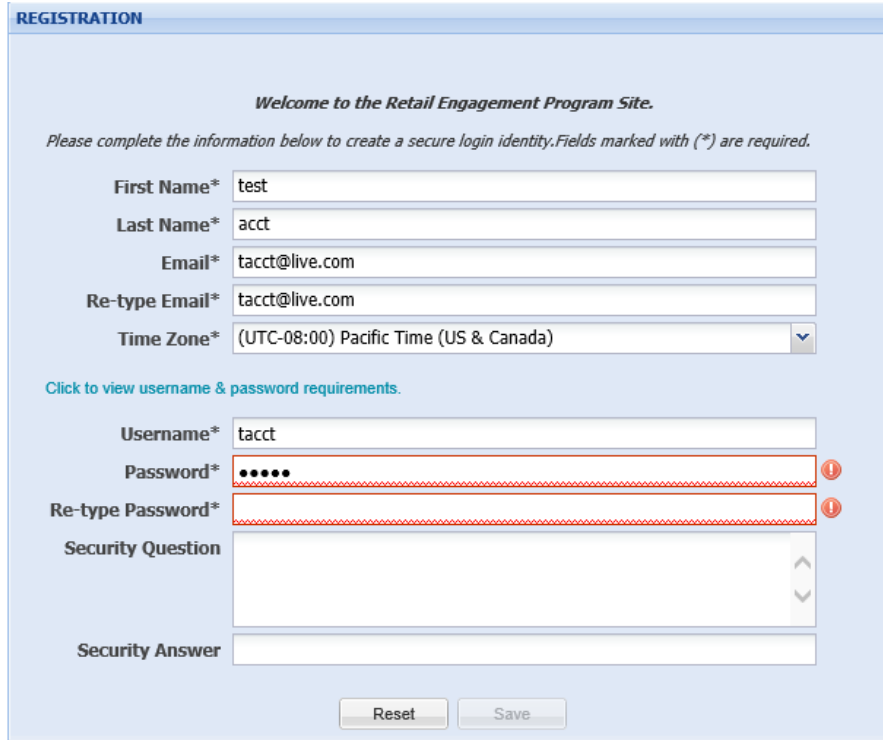
An initial username and temporary password will be provided. If the account information is not known, use the “**Can’t access your?**” account link below the **Sign In** button.

Click on the following link, or type the address into a web browser: www.msftreps.com

The login page appears:



During the first login to the system, a prompt to change the temporary password and security question appears:



REGISTRATION

Welcome to the Retail Engagement Program Site.

Please complete the information below to create a secure login identity. Fields marked with () are required.*

First Name* test

Last Name* acct

Email* tacct@live.com

Re-type Email* tacct@live.com

Time Zone* (UTC-08:00) Pacific Time (US & Canada) ▼

[Click to view username & password requirements.](#)

Username* tacct

Password* !

Re-type Password* !

Security Question

Security Answer

Reset Save

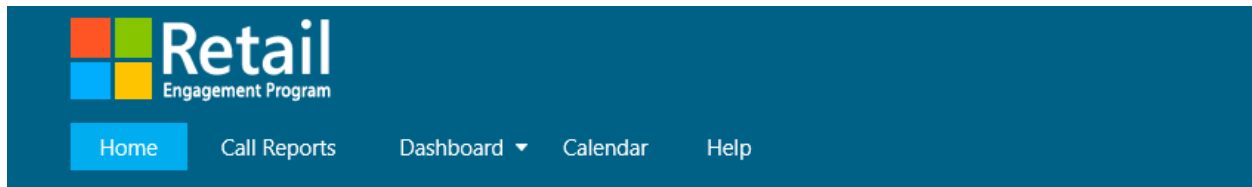
Password Requirements:

- Must be from 6-14 characters long.
- Contain at least 1 uppercase character and at least 1 lowercase character.
- Contain at least 1 of the following special characters: - _ ! @ # \$ % ^ & * + = () { } [] < > | \ ~ , . ; : / ?

Enter a new Password, Security Question and Security Answer. Click on Save at which point the REP Home screen will appear:

REP Website

Home Screen



Retail Engagement Program

Welcome to the Retail Engagement Program portal. This portal is designed to manage the retail field labor program by market and account across Windows, Xbox, Surface and Office.

Select a Task



[Welcome and Setup](#)

Messages from the local administrator and instructions for installing the REP application on a Windows device are found here.

[Call Reports](#)

View completed call reports and export them to Excel.

[Dashboard](#)

Visit statistics about Store visits, 1:Many Training Events, Word on the Street submissions and view the photos taken in stores.

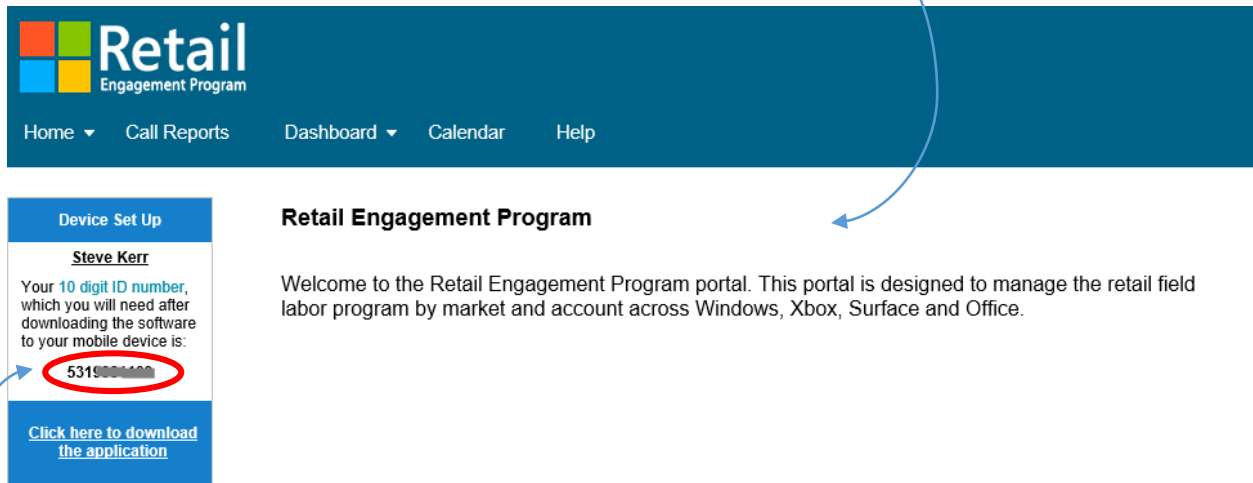
[Calendar](#)

View and modify the store visit calendar. Use a simple drag and drop interface for scheduling monthly store visits.

Welcome and Setup

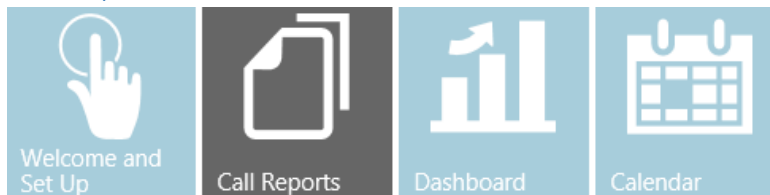


This screen will have messages from the local administrator on the right.



On the left is the unique 10 digit ID needed for the Windows Application. Below that is a link to the application download and installation instructions.

Call Reports



Call Reports can be viewed and exported to Excel. There is also the ability to email the call report and see the photos taken during that store visit.

Call Reports		
Staple Surface Blitz	Transaction Report	GPS
Staples	Transaction Report	GPS
Toys R Us (no Surface)	Transaction Report	GPS

For each type of call report, there is a separate transaction report. Click on the appropriate link to the right of the Call Report name.

From: 09/20/2013 To: 09/20/2013 User Name: All [Get Results](#)

Select a Date Range (defaults to the last report submission date). Managers can also select a single rep or all reps assigned to them. Select the **Get Results** button.

Quick email function to submit send report to others.

Click to view and edit store notes

Export records to an Excel spreadsheet.

Click to view transaction in a formatted PDF Report

From: 01/01/2014 To: 01/15/2014 User Name: All Language: Eng

Page 1 of 1 Results per page: 25

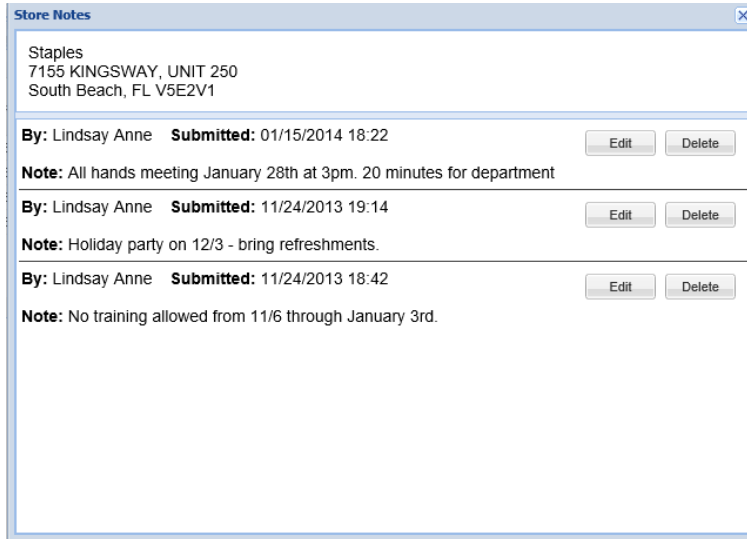
		Device ID	First Name	Last Name	Received	La
1	   (1)  (4)	896 743 1596	Lindsay	Anne	Wed, Jan 15, 2014 08:58:44 PM	Unai
2	   (4)  (4)	896 743 1596	Lindsay	Anne	Wed, Jan 15, 2014 08:39:07 PM	Unai
3	   (4)  (4)	896 743 1596	Lindsay	Anne	Wed, Jan 15, 2014 08:33:05 PM	Unai
4	   (4)  (4)	896 743 1596	Lindsay	Anne	Wed, Jan 15, 2014 06:23:05 PM	Unai

View photos taken during this store visit.

When Location Coordinates are available with the transaction, map icon will drop out to Bing maps.

Store Notes

Store notes are input from inside a store visit call report. These can consist of reminders or helpful hints about the store. Clicking on the pencil icon in a transaction report  ⁽⁴⁾ will open the Store Note editor for editing or deleting of content. These modifications will appear the next time the app synchronizes.



Store Notes

Staples
 7155 KINGSWAY, UNIT 250
 South Beach, FL V5E2V1

By: Lindsay Anne **Submitted:** 01/15/2014 18:22 Edit Delete

Note: All hands meeting January 28th at 3pm. 20 minutes for department

By: Lindsay Anne **Submitted:** 11/24/2013 19:14 Edit Delete

Note: Holiday party on 12/3 - bring refreshments.

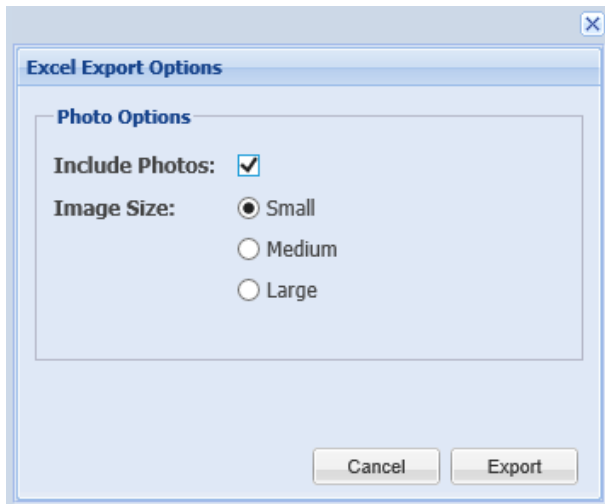
By: Lindsay Anne **Submitted:** 11/24/2013 18:42 Edit Delete

Note: No training allowed from 11/6 through January 3rd.

Export Transaction Reports

Basic reporting is contained in the Dashboards. The Download to Excel option allows further analysis of call reports.

Click on the Download to Excel button . Select whether to include photos and the size of the photos, then click **Export**.



Excel Export Options

Photo Options

Include Photos: ☒

Image Size: ☒ Small
☐ Medium
☐ Large

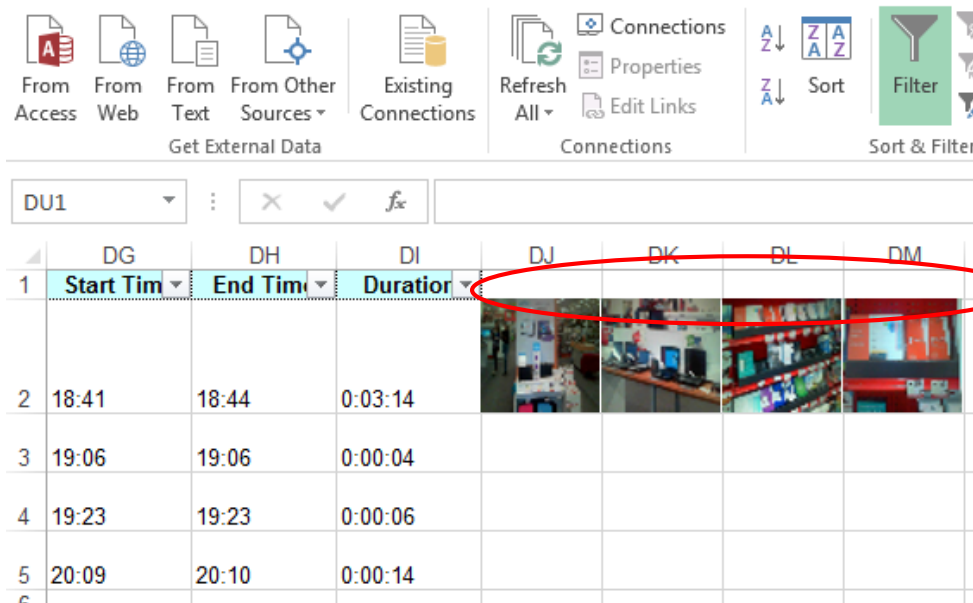
Cancel Export

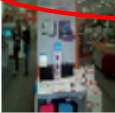
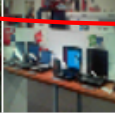
Note: Exporting photos does not download the full resolution photo, only thumbnails of the original photo.

Once the file is opened in Excel, all of the questions included in the call report will be listed as the column headers. Each store visit will be a row in the spreadsheet.

Note: Currently, if photos are included and the data is sorted, the photos will not remain with the correct record. To resolve this, enter titles in the columns that contain pictures before selecting the Filter and Sort options in Excel. A solution to this problem is being investigated.

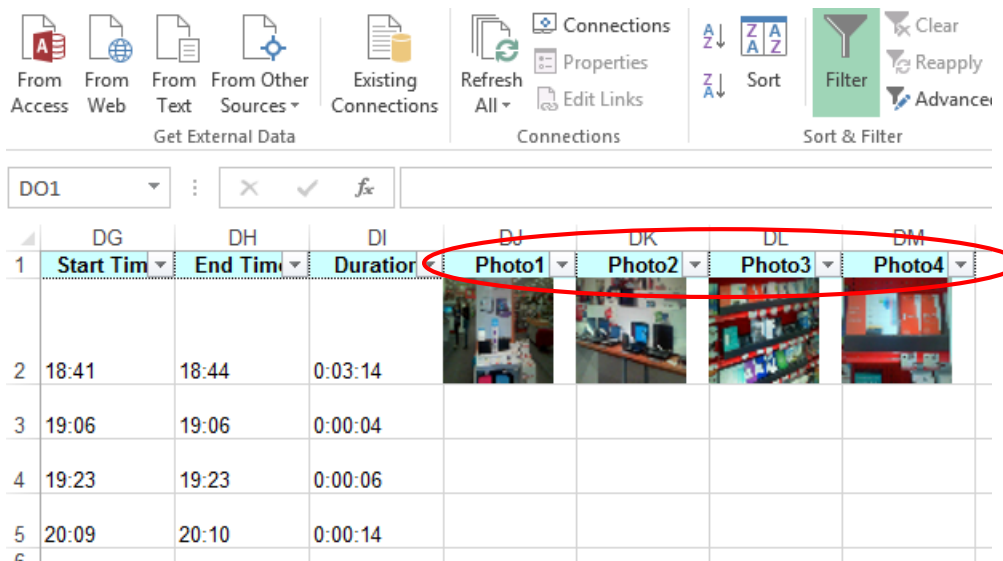
Before (notice that there are no filter options for the photo columns):

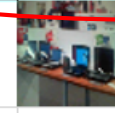
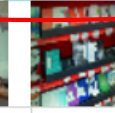


	DG	DH	DI	DJ	DK	DL	DM
1	Start Tim	End Tim	Duration				
2	18:41	18:44	0:03:14				
3	19:06	19:06	0:00:04				
4	19:23	19:23	0:00:06				
5	20:09	20:10	0:00:14				

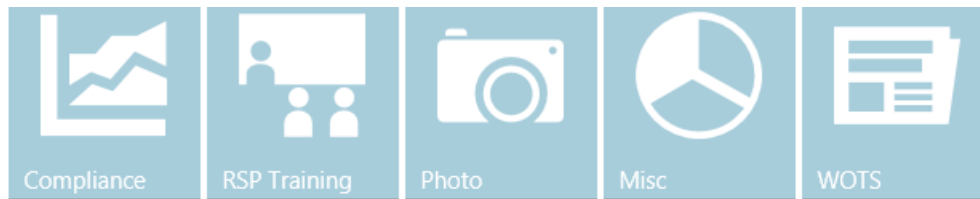
Turn off filtering, add column headers and then turn filtering back on.

After (photos will now sort and stay with the original record):



	DG	DH	DI	DJ	DK	DL	DM
1	Start Tim	End Tim	Duration	Photo1	Photo2	Photo3	Photo4
2	18:41	18:44	0:03:14				
3	19:06	19:06	0:00:04				
4	19:23	19:23	0:00:06				
5	20:09	20:10	0:00:14				

Dashboard

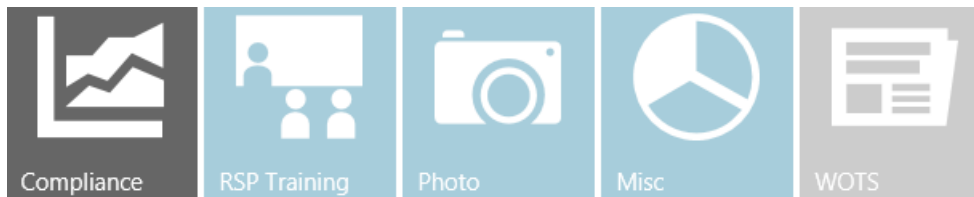


Dashboards are available to view call report information.

- Compliance: monthly store visit progress
- RSP Training: monthly RSP training statistics
- Photo: view pictures taken during store visits
- Misc: Ad-hoc reporting of call report items
- WOTS: Word on the Street

All dashboards have a **My Saved Reports** option. After filtering any dashboard, select the **Save Current Report** button to save your changes. Saved views can be edited or deleted by clicking on the **Edit** button.

Compliance

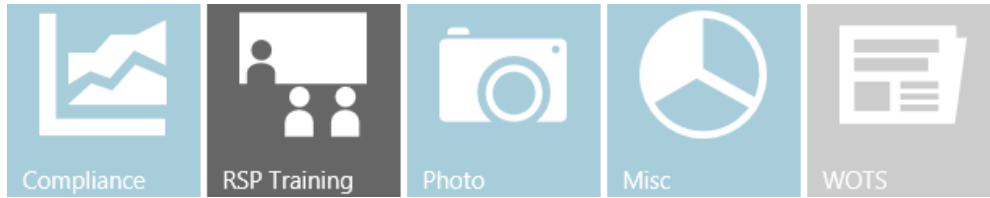


Track monthly store visit progress.

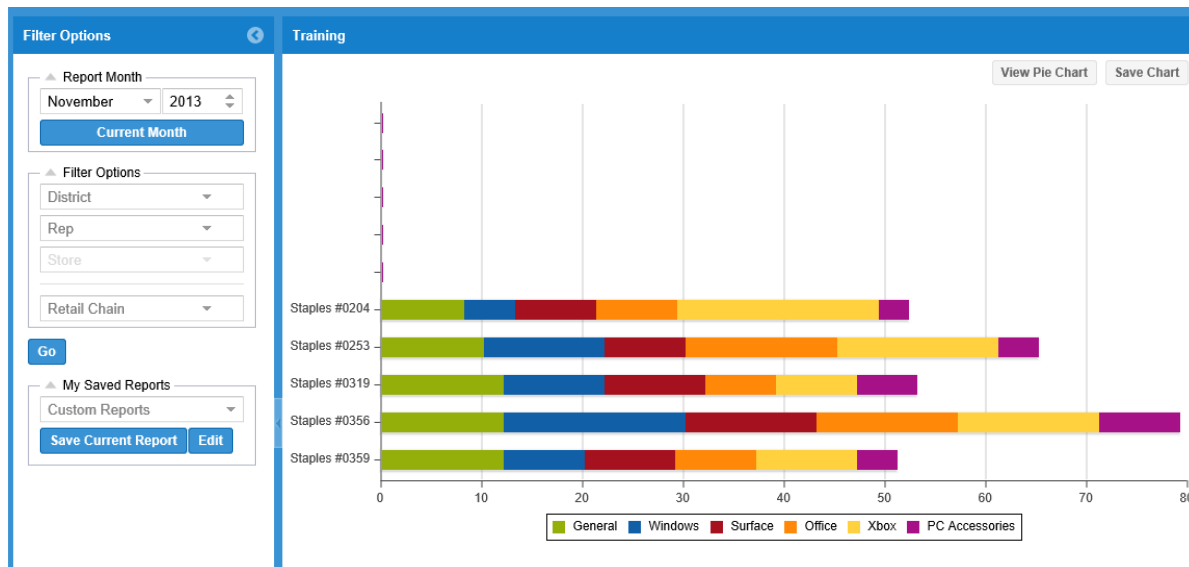


Filter by date, regions and retail chain. Hover on the bar graph to retrieve details.

RSP Training

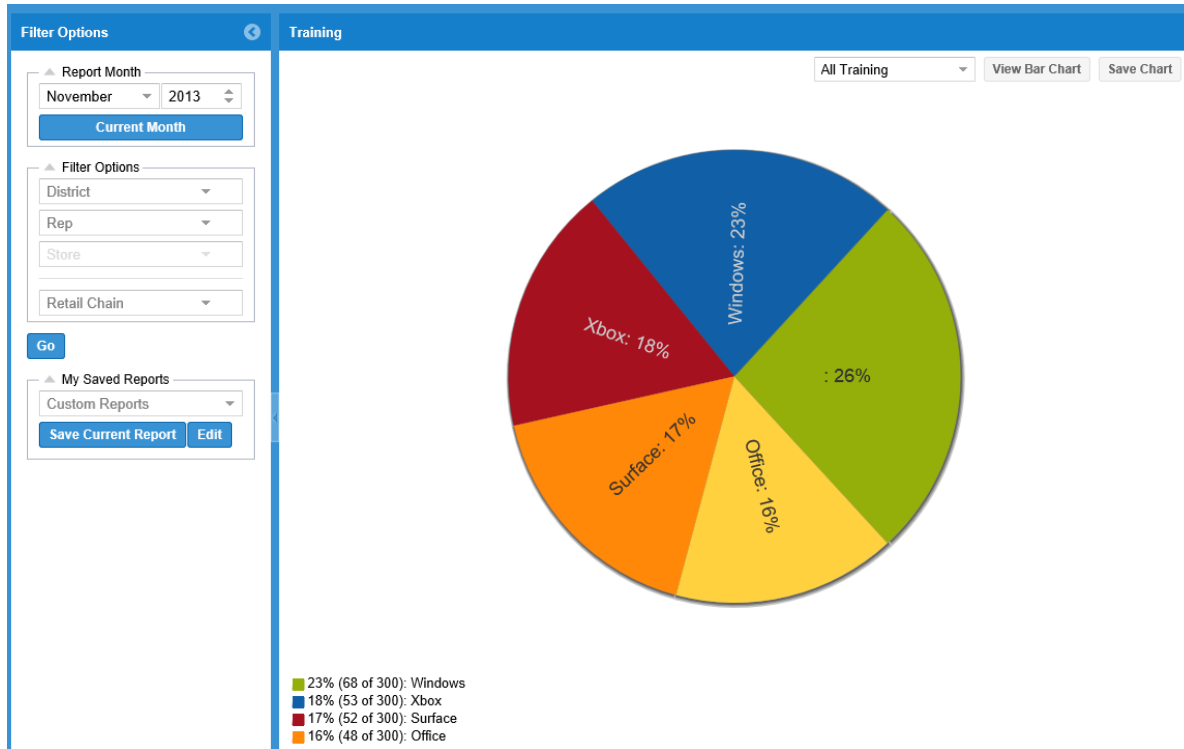


View monthly statistics for in-store RSP training activities.

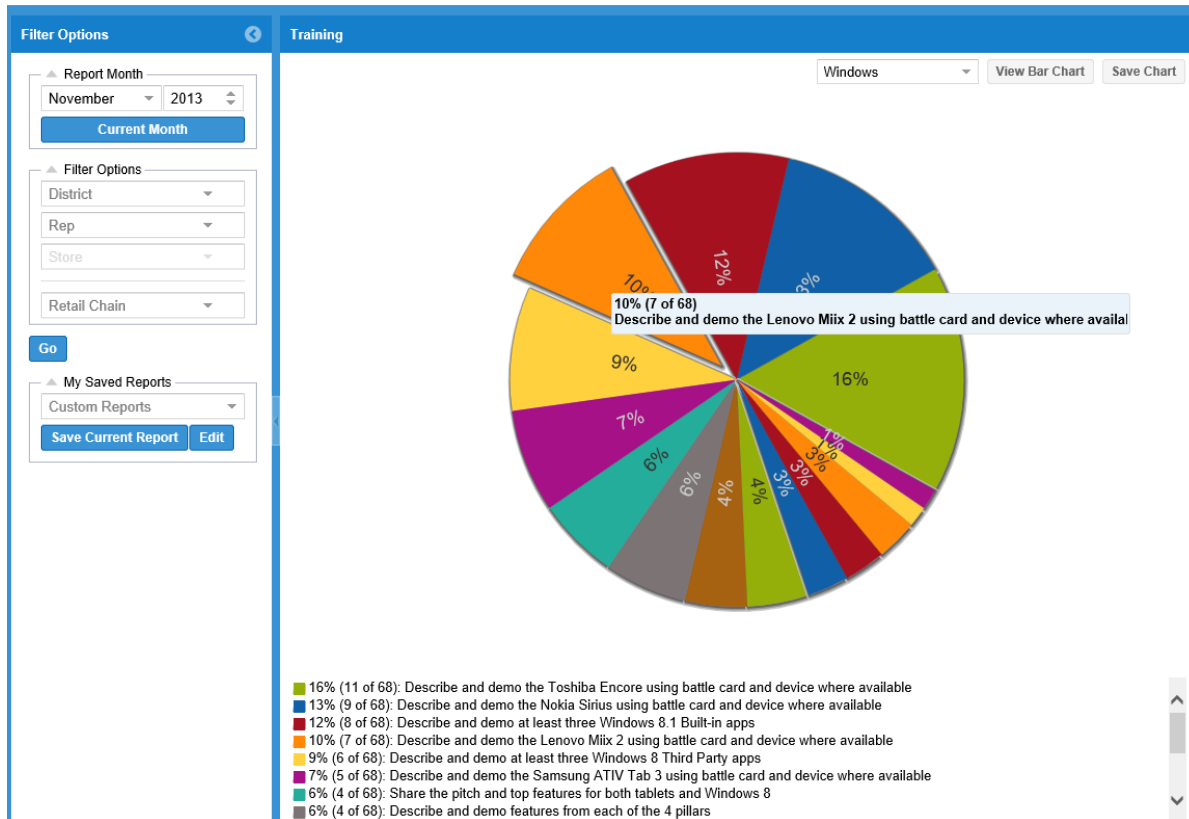


Filter by date, regions and retail chain. Hover on the bar graph to retrieve details.

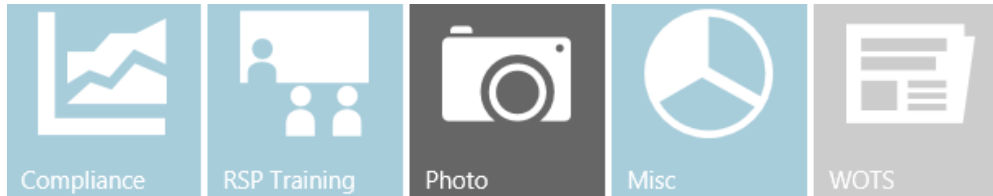
Click the **View Pie Chart** button to switch to a pie chart view.



Hovering over a slice of the pie chart shows the detail. Clicking on a slice will select that item and provide the detail for that item (Example: clicking on Windows will show the individual monthly training tasks for Windows).



Photo



View the photos taken during store visits.

Call Report Photos

▲ Date Range

From: 02/27/2014

To: 03/06/2014

▲ Filter Options

Retail Chain

Store

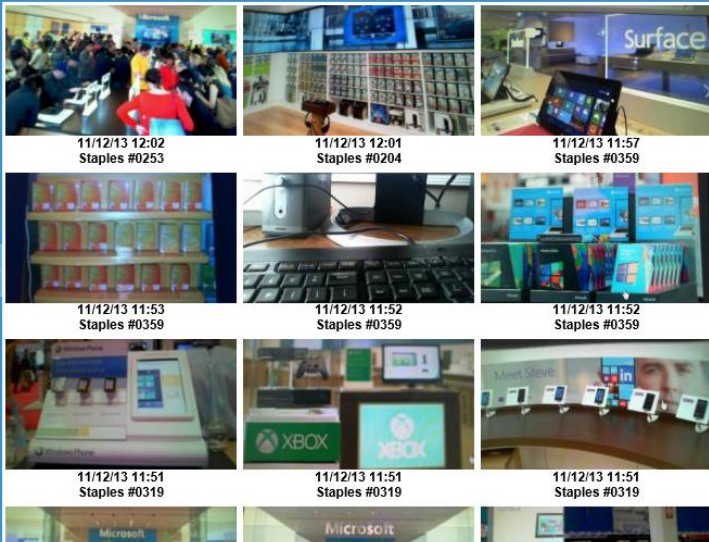
Product

Go

▲ My Saved Reports

Custom Reports

Save Current Report Edit



11/12/13 12:02 Staples #0253

11/12/13 12:01 Staples #0204

11/12/13 11:57 Staples #0359

11/12/13 11:53 Staples #0359

11/12/13 11:52 Staples #0359

11/12/13 11:52 Staples #0359

11/12/13 11:51 Staples #0319

11/12/13 11:51 Staples #0319

11/12/13 11:51 Staples #0319

Filter by date range, retail chain, individual store, and product. Photos are displayed newest to oldest. Click on a photo to see a full size image and get the detail of the store visit call report.

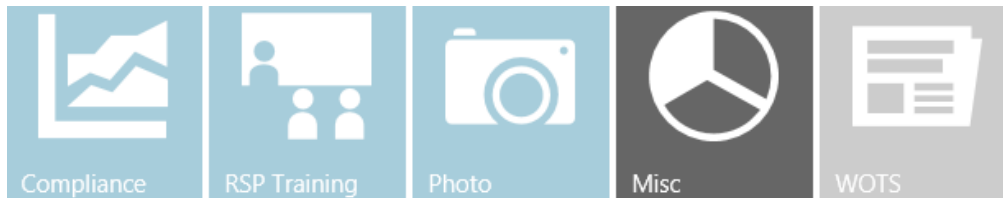


Form: Staples
Chain: Staples
Store: Staples
Address: 2525 36TH ST. N.E., UNIT 135
Miami, FL 11Y5T4

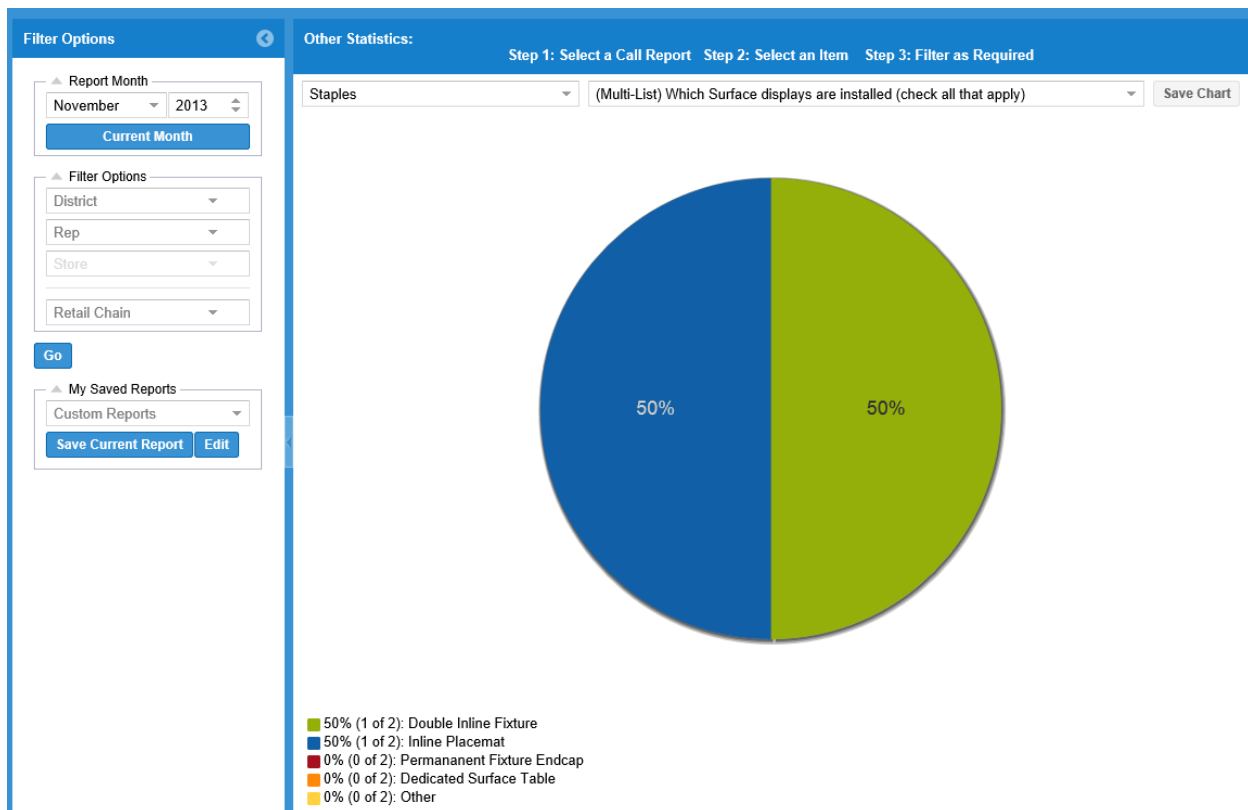
Visit Date/Time: 11/12/13 11:57
User: Lindsay Anne
Device ID: 8967431596

[Get Transaction Report \(PDF\)](#)

Misc

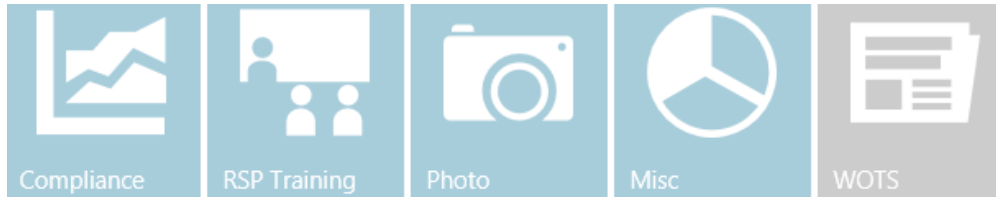


Display data graphically from any question on a call report.



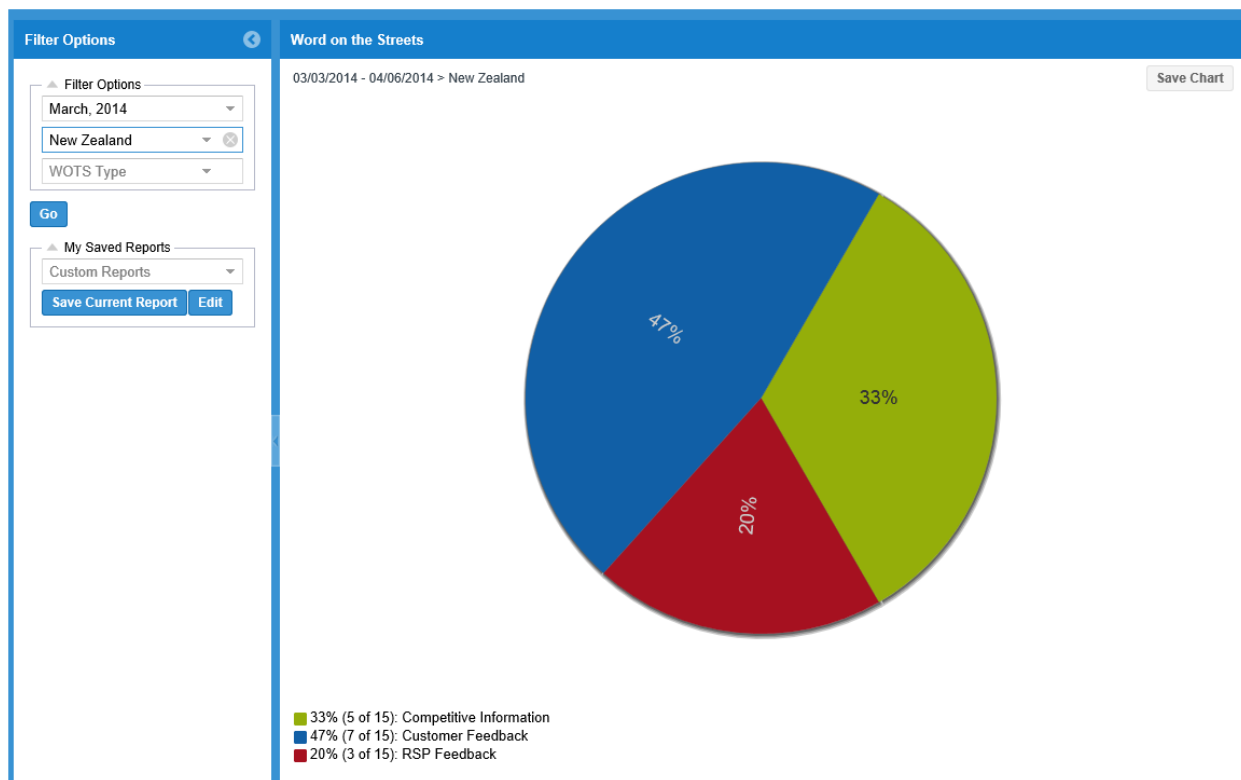
Select the call report and item from the drop down lists. Hovering over a slice of the pie chart shows the detail.

WOTS



Display data collect through the Word on the Street Call report. Word on the Street is used to gather:

- Competitive information
- Customer feedback
- RSP Feedback



Filter by date, regions and retail chain. Hover on the bar graph to retrieve details. Hovering over a slice of the pie chart shows the detail. Clicking on a slice will select that item and provide the detail for that item.

REP Application

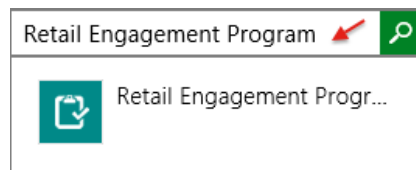
The REP application runs on Windows 8.1 and above, with support for both x86 and RT platforms. A unique 10 digit identification number is needed to run the application. See the [Welcome and Setup](#) section to obtain an ID.

Application Installation

1. Open Windows Store app



2. Search for Retail Engagement Program app
3. Select the application from the list (it will be the only one listed)



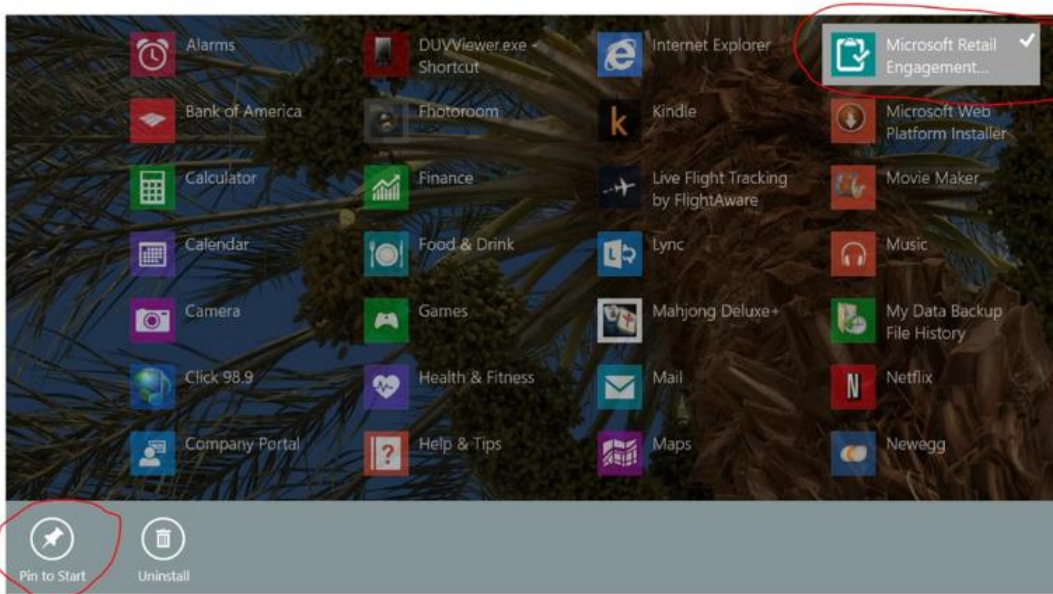
4. Select to install



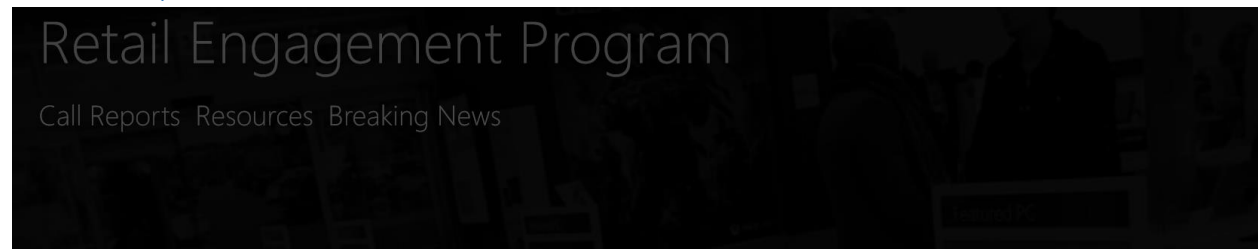
5. The installation will happen automatically and Windows will notify when the installation is complete

Starting the Program after installation:

If you are using Windows 8.1, swipe up from the bottom of your Start screen, and you will see the program listed as "Microsoft Retail Engagement Program" with "New" highlighted below it. Right-click on the icon and select "Pin" to start at the bottom. The application will now appear on the far right of your Start screen.



Initial Setup



ID

A ten digit ID number is needed to access most features of this app. Please enter your user ID number now.

OK



The first time the application is run, a prompt appears requesting an ID. Enter the ID, and press OK.

Home Screen



The home screen is divided into the following sections:

- Call Reports
 - [Store Visit](#) Call Reports – store visit reporting and RSP training tracking
 - [Event Call Report](#) – 1 to Many training report
 - [Word on the Street](#) – Capture Competitive information, Customer and RSP Feedback
- Resources
 - My Training – Monthly training assignments and resources
 - Plan-o-grams – store display information
 - Kiosk Maintenance – Interactive display maintenance instructions
 - Demo Installation – Windows Demo instructions
- Breaking News
 - New product information
 - Announcements

Using the REP Application without an internet connection

The REP application is designed to work with or without an internet connection. If there is no internet connectivity in the retail stores, syncing the application before the start of the day and at the end of the day is mandatory.

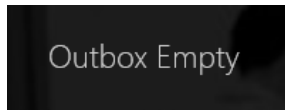
To manually refresh the application:

1. Connect to WiFi
2. Open the Charm Bar by swiping in from the right side of the screen
3. Select **Settings**
4. On the Setting menu, select **Preferences**
5. Select **Refresh Now**

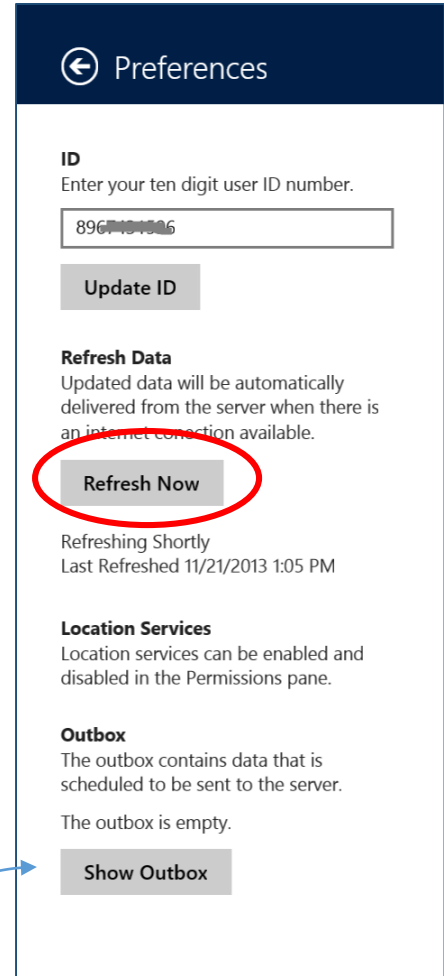
Call reports and RSP training conducted during the day will be stored in the Outbox until the device is connected to the internet and a refresh is performed.

At the end of the day, perform the same manual refresh process to send the completed call reports and training to the server.

Notification of pending uploads is displayed in the upper right corner of the application.



The content of the Outbox can also be displayed in the Preference menu by selecting **Show Outbox**.



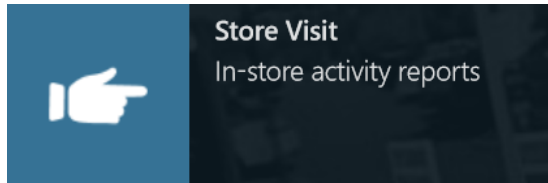
A screenshot of the "Preferences" screen in the REP application. The screen has a dark blue header with a back arrow and the title "Preferences". Below the header, there are several sections:

- ID**: "Enter your ten digit user ID number." Below this is a text input field containing "896741906" and a grey button labeled "Update ID".
- Refresh Data**: "Updated data will be automatically delivered from the server when there is an internet connection available." Below this is a grey button labeled "Refresh Now", which is circled in red in the original image.
- Refreshing Shortly**: "Last Refreshed 11/21/2013 1:05 PM"
- Location Services**: "Location services can be enabled and disabled in the Permissions pane."
- Outbox**: "The outbox contains data that is scheduled to be sent to the server. The outbox is empty." Below this is a grey button labeled "Show Outbox".

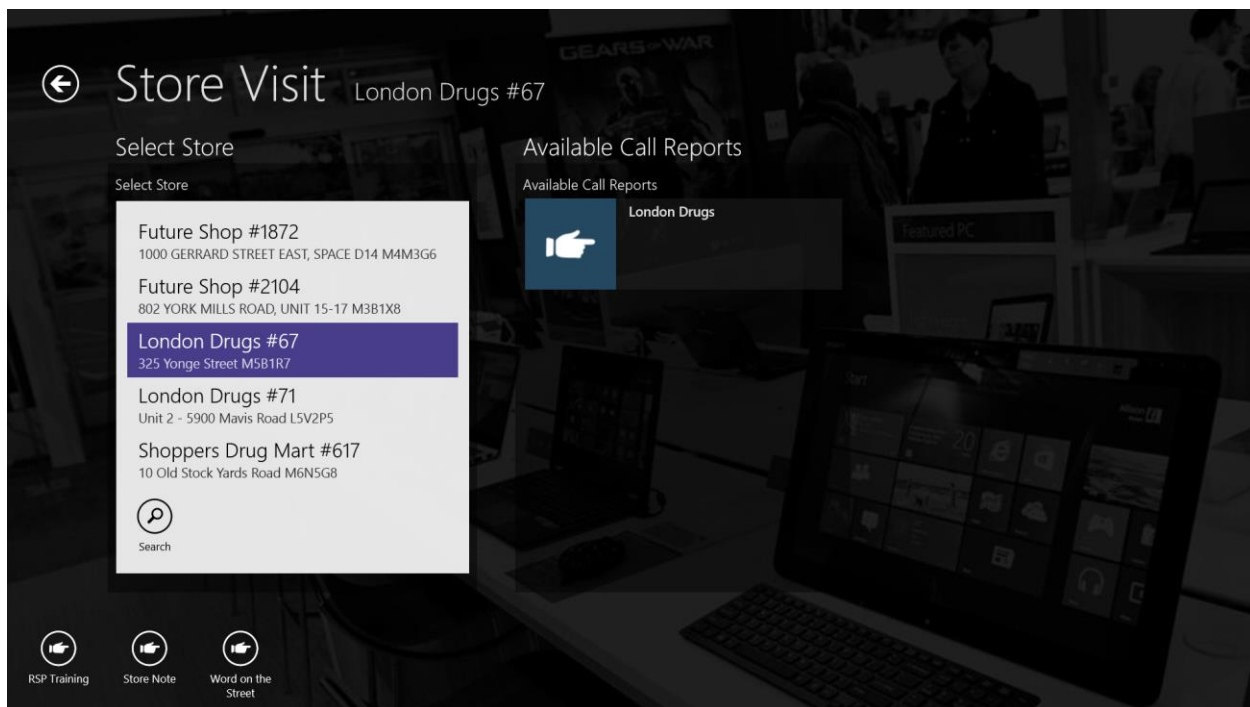
A blue arrow points from the "Show Outbox" button in the screenshot to the text "The content of the Outbox can also be displayed in the Preference menu by selecting **Show Outbox**."

Call Reports

Store Visit

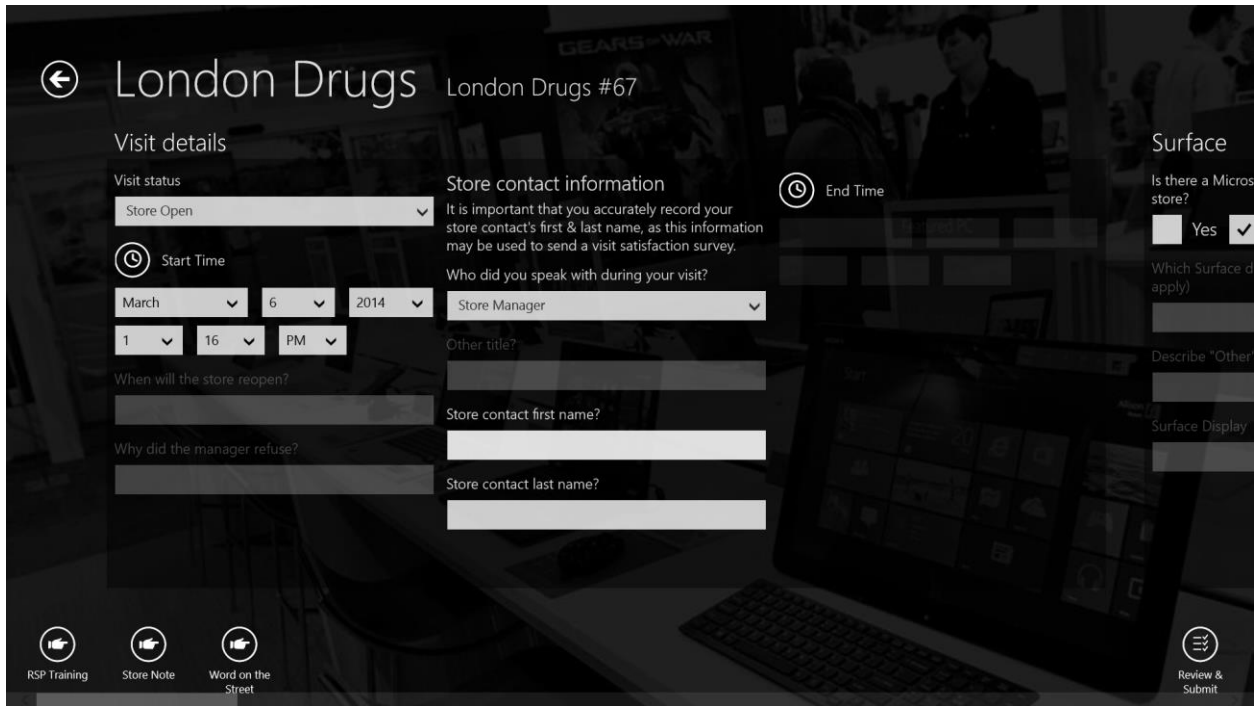


Select the store from the list on the left.



A list of call reports for that store will appear on the right. There may be multiple call reports based on the activities for that store. Contact your manager if you are unsure what report to complete.

Select the appropriate call report on the right.



Call reports are grouped into the following sections:

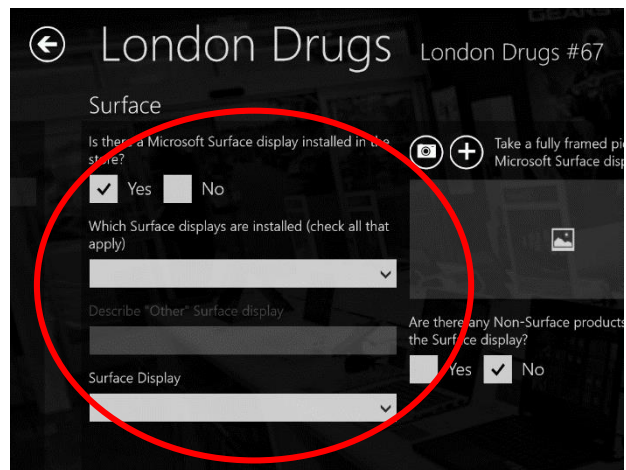
- Visit Details
- Windows
- Surface
- Office
- Xbox
- PC Accessories

Each store may have different sets of items and question within the call report. By panning right and left, all sections for the call report can be easily accessed at any time during the store visit.

Items that are greyed out are not required unless another question is answered first. For example:

In the screen shot above, the items below the “**Is there a Microsoft Surface display installed in the store?**” item are grey.

Answering **Yes** to the item triggers additional items below to be highlight and now must be answered.



During a store visit there may be a need to return to the application home screen. The system will prompt you to save.

Staples

Do you want to save the values in this form before leaving?

Yes

No

Opening the same call report for that store will prompt to use the previously session.

Staples

Values from a previous session are available for this form. Use the previous values?

Yes

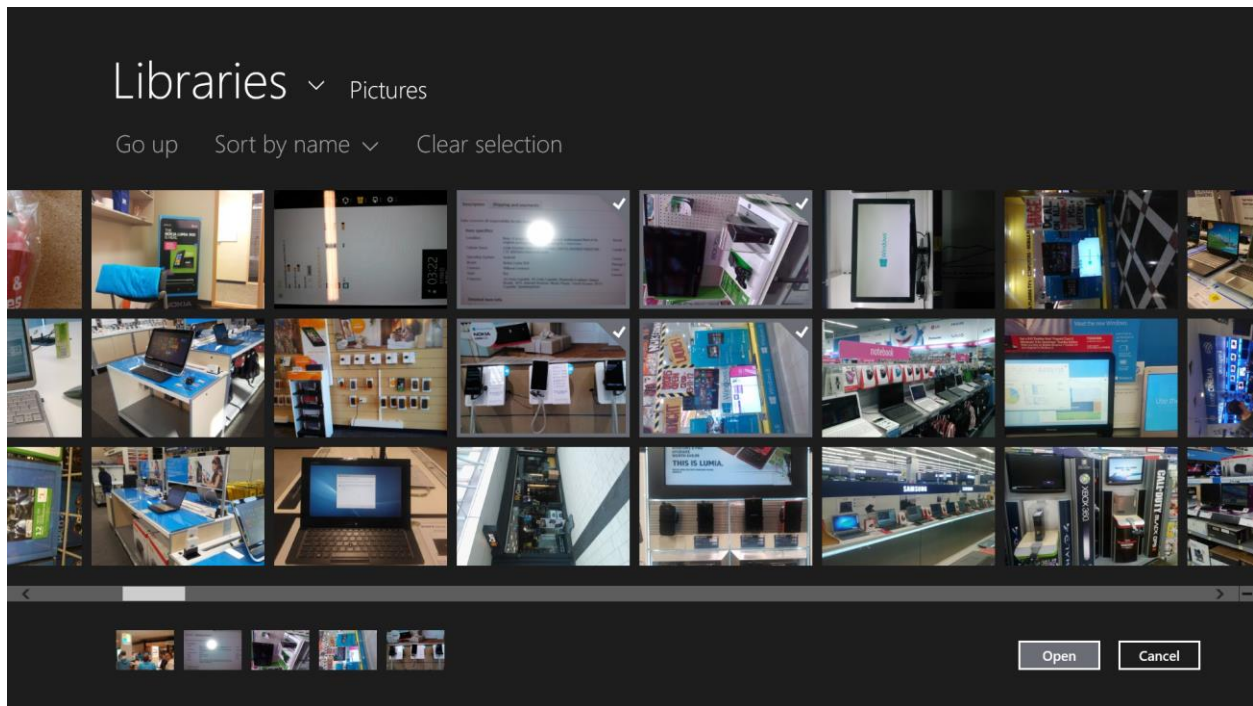
No

Photos

Whenever there is a **Photo** option in a call report, Word on the Street, Event reports, etc. There are two options:



1. Take a photo
 - a. Use the built in camera to capture a picture
 - b. Click on the camera icon on the left
 - c. Tap the screen to take the picture
 - d. There are options to crop the photo save or retake.
 - e. To take multiple photos, just click on the camera button again.
2. Upload a photo (requires version 1.0.0.110 or higher for this option)
 - a. Upload previously taken photos from a phone, camera, OneDrive, etc.
 - b. Tap on the plus button to the right of the camera button.
 - c. Select the location of the pictures using the pull down menu on the top left.
 - d. Select pictures by dragging down on each one
 - e. A checkmark will appear on selected photos and a thumbnail list will build on the bottom of the screen.
 - f. Click on **Open** to attach the photos



To remove a photo before submitting:

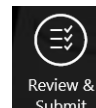
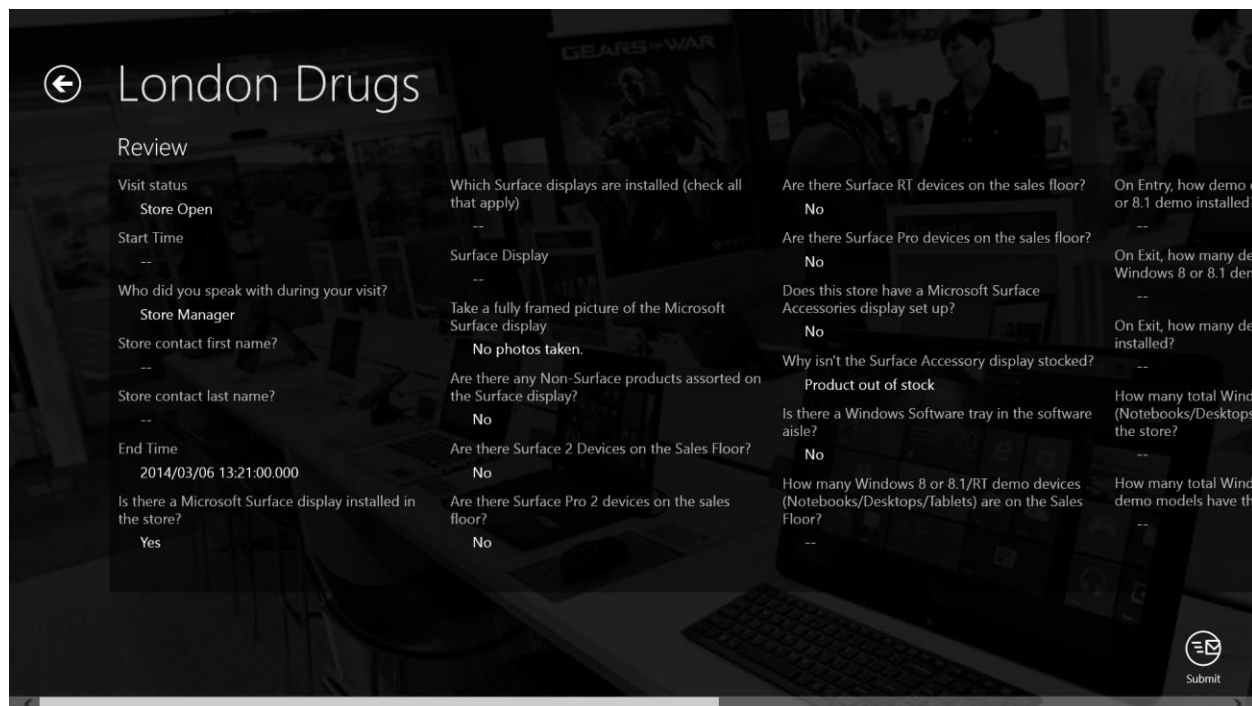
1. Click on the thumbnail in the photo section (scroll arrows are available if more than one picture is uploaded)



2. Click on the trash can on the lower right of the screen to remove the photo.

Submitting a call report

When the store visit is complete, click on the **Review & Submit** button on the bottom right of the screen.

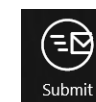
London Drugs

Review

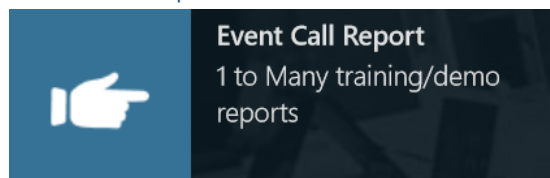
Visit status Store Open	Which Surface displays are installed (check all that apply) --	Are there Surface RT devices on the sales floor? No	On Entry, how demo d or 8.1 demo installed? --
Start Time --	Surface Display --	Are there Surface Pro devices on the sales floor? No	On Exit, how many de Windows 8 or 8.1 dem --
Who did you speak with during your visit? Store Manager	Take a fully framed picture of the Microsoft Surface display No photos taken.	Does this store have a Microsoft Surface Accessories display set up? No	On Exit, how many de installed? --
Store contact first name? --	Are there any Non-Surface products assorted on the Surface display? No	Why isn't the Surface Accessory display stocked? Product out of stock	How many total Wind (Notebooks/Desktops, the store? --
Store contact last name? --	Are there Surface 2 Devices on the Sales Floor? No	Is there a Windows Software tray in the software aisle? No	How many total Wind demo models have the --
End Time 2014/03/06 13:21:00.000	Are there Surface Pro 2 devices on the sales floor? No	How many Windows 8 or 8.1/RT demo devices (Notebooks/Desktops/Tablets) are on the Sales Floor? --	
Is there a Microsoft Surface display installed in the store? Yes			

Submit

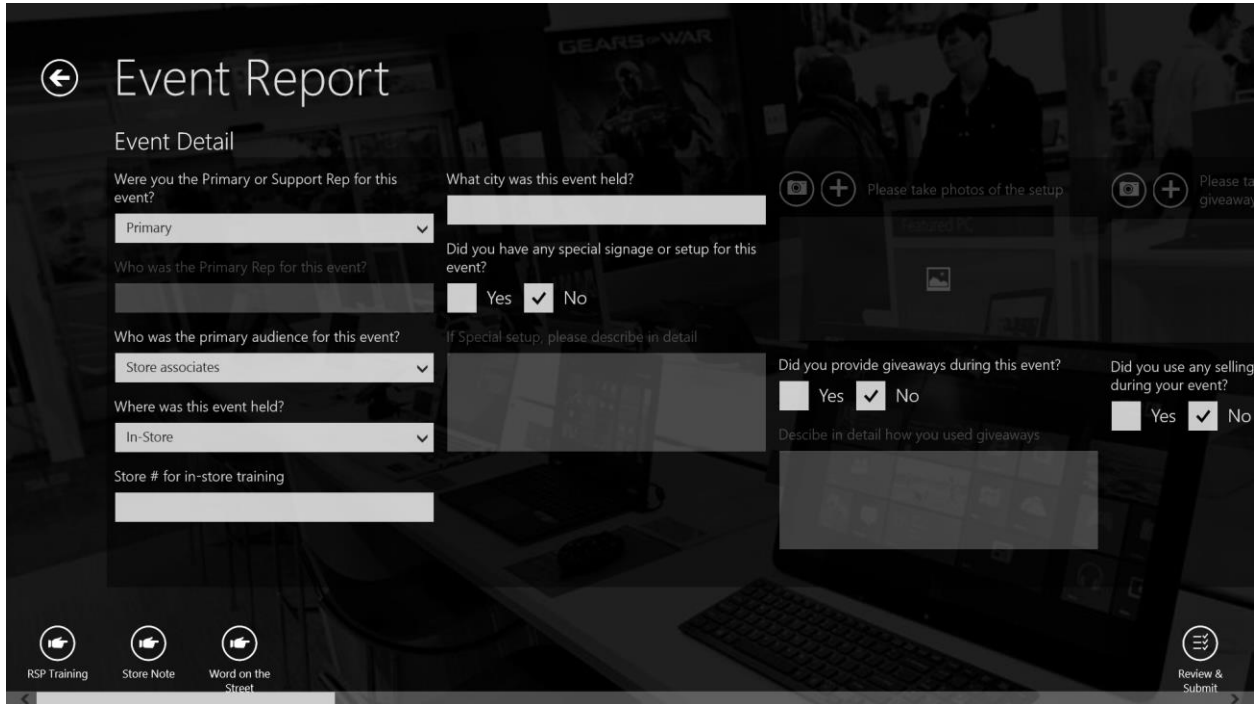
Verify all items have been completed, then press the **Submit** button in the lower left corner of the screen.



Event Call Report



Event call reports capture the information from one to many training sessions. Below is an example of the layout.



Event Report

Event Detail

Were you the Primary or Support Rep for this event?

Who was the Primary Rep for this event?

Who was the primary audience for this event?

Where was this event held?

Store # for in-store training

What city was this event held?

Did you have any special signage or setup for this event?
☐ Yes ☒ No

If Special setup, please describe in detail

Did you provide giveaways during this event?
☐ Yes ☒ No

Describe in detail how you used giveaways

Did you use any selling during your event?
☐ Yes ☒ No

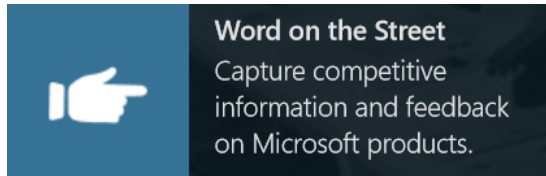
Please take photos of the setup

Please take photos of the giveaway

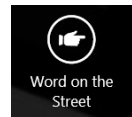
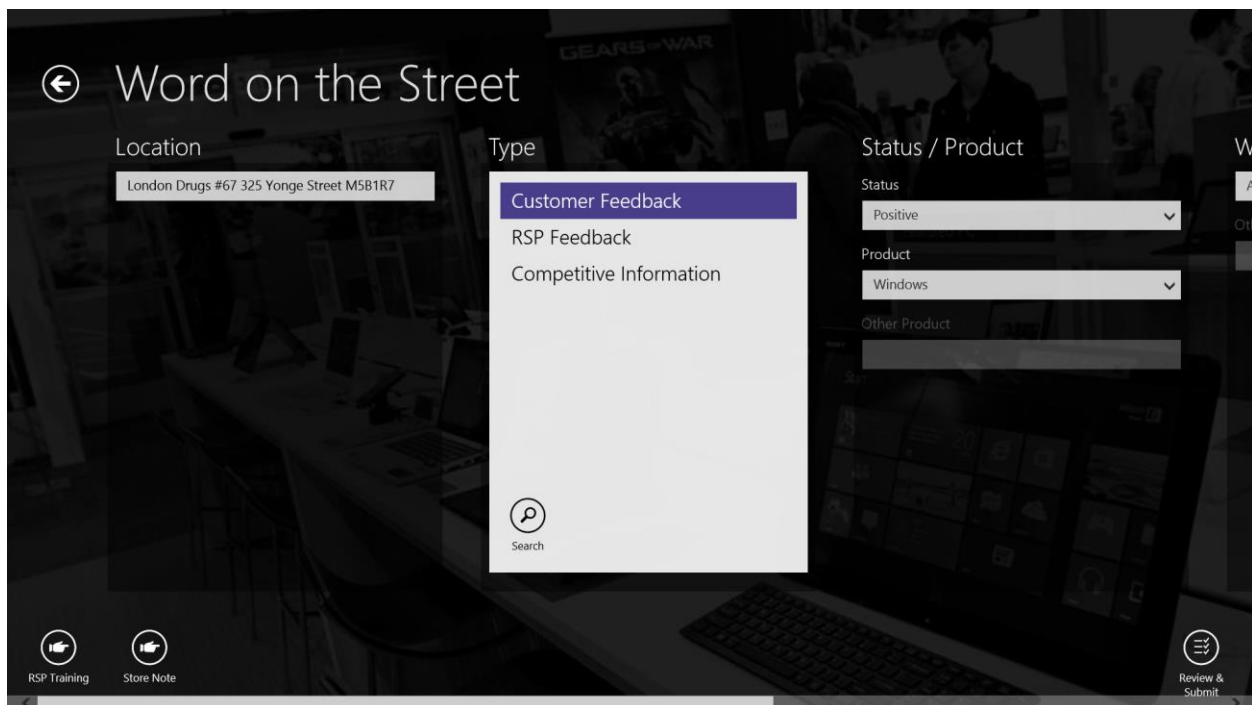
Navigation:
 RSP Training | Store Note | Word on the Street | Review & Submit

The process for completing and submitting an Event call report is the same as a store visit. See the [Store Visit](#) section earlier in this guide for reference.

Word on the Street



Word on the Street (WOTS) call reports are used to capture competitive information, customer and RSP feedback. During a store visit, there may be multiple instances where a WOTS report would need to be completed. WOTS reports can be accessed while working inside other call reports. A quick launch button is available in the lower left hand corner of the screen.

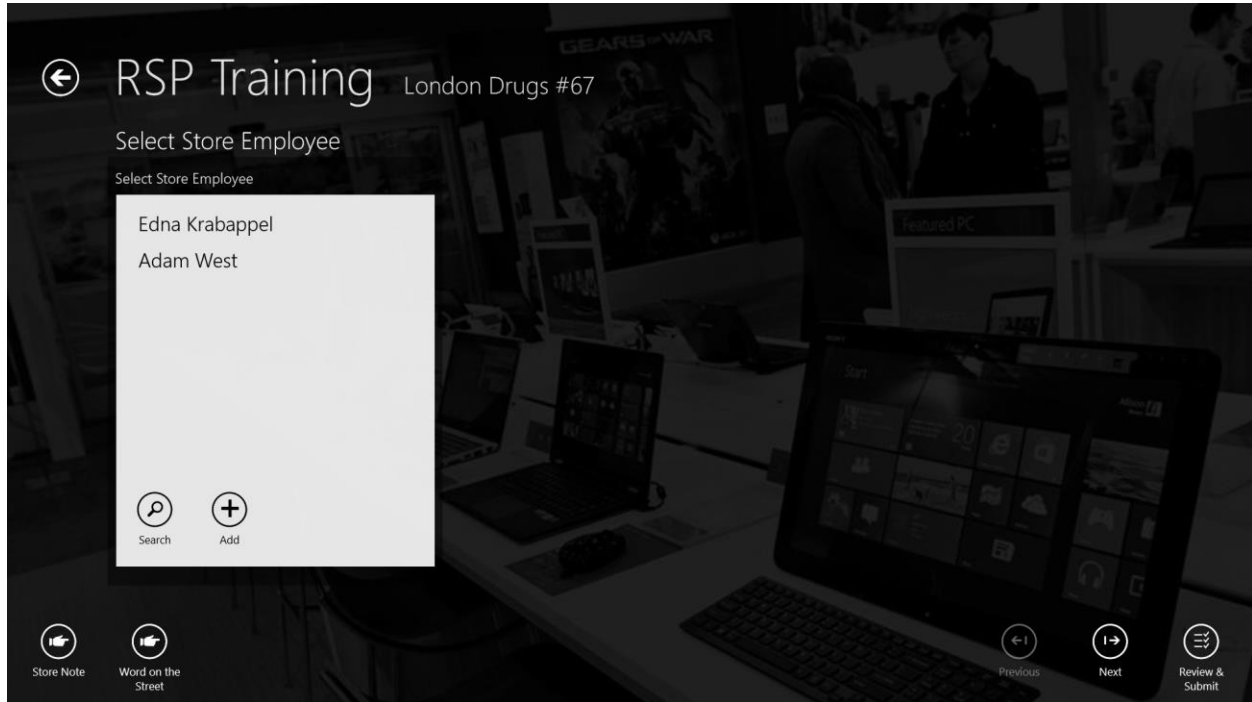
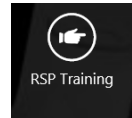



The screenshot shows the 'Word on the Street' form interface. At the top left is a back arrow icon. The title 'Word on the Street' is prominently displayed. Below the title, there are three main sections: 'Location', 'Type', and 'Status / Product'. The 'Location' field contains the text 'London Drugs #67 325 Yonge Street M5B1R7'. The 'Type' section has a dropdown menu with three options: 'Customer Feedback' (highlighted in purple), 'RSP Feedback', and 'Competitive Information'. Below this dropdown is a 'Search' icon. The 'Status / Product' section has two dropdown menus: 'Status' with 'Positive' selected, and 'Product' with 'Windows' selected. Below these is an 'Other Product' field. At the bottom of the screen, there are three icons: 'RSP Training', 'Store Note', and 'Review & Submit'.

The process for completing and submitting a Word on the Street call report is the same as a store visit. See the [Store Visit](#) section earlier in this guide for reference.

RSP Training

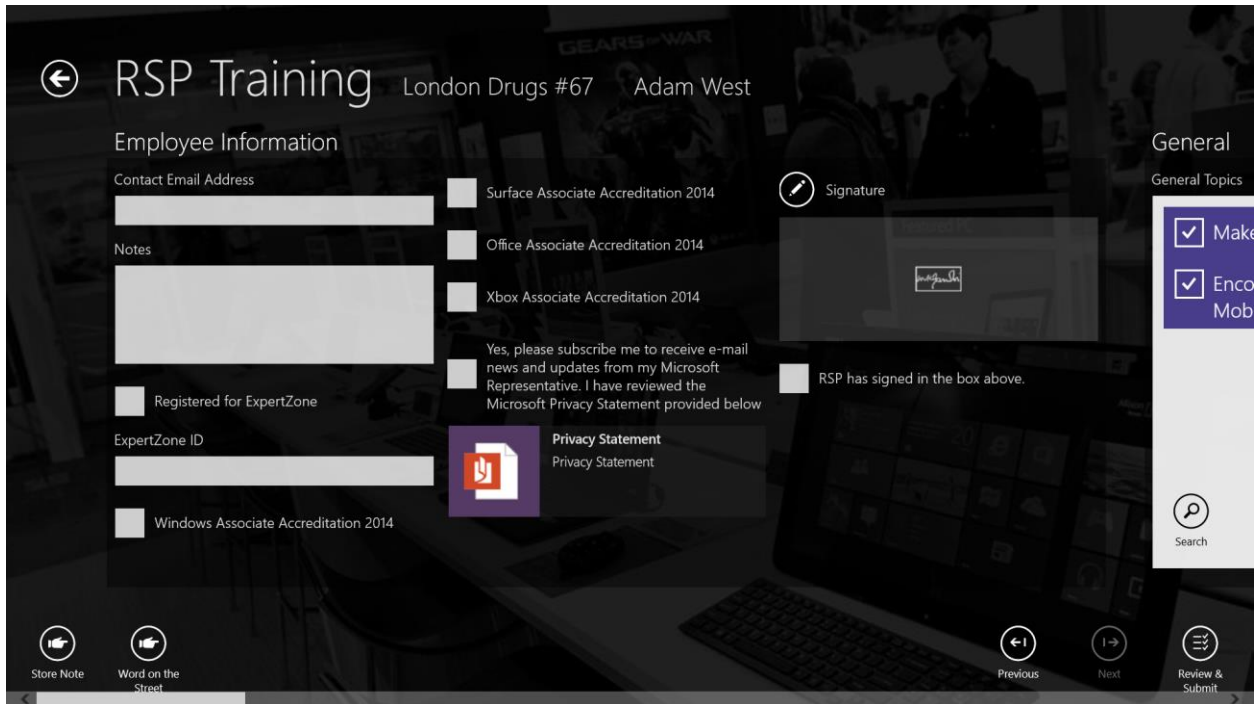
Training store employees (RSPs) is an essential part of a store visit. RSP Training can be accessed while working inside of store visit call reports. A quick launch button is available in the lower left hand corner of the screen.



Note: If there are no employees listed on the left, select the **Add** button and enter the store employees first and last name. Then select **Accept** to add the employee.

Select an employee from the list on the left, then select **Next**.





RSP Training London Drugs #67 Adam West

Employee Information

Contact Email Address

Notes

☐ Registered for ExpertZone

ExpertZone ID

☐ Windows Associate Accreditation 2014

☐ Surface Associate Accreditation 2014

☐ Office Associate Accreditation 2014

☐ Xbox Associate Accreditation 2014

Yes, please subscribe me to receive e-mail news and updates from my Microsoft Representative. I have reviewed the Microsoft Privacy Statement provided below

☐ RSP has signed in the box above.

Privacy Statement
Privacy Statement

Signature

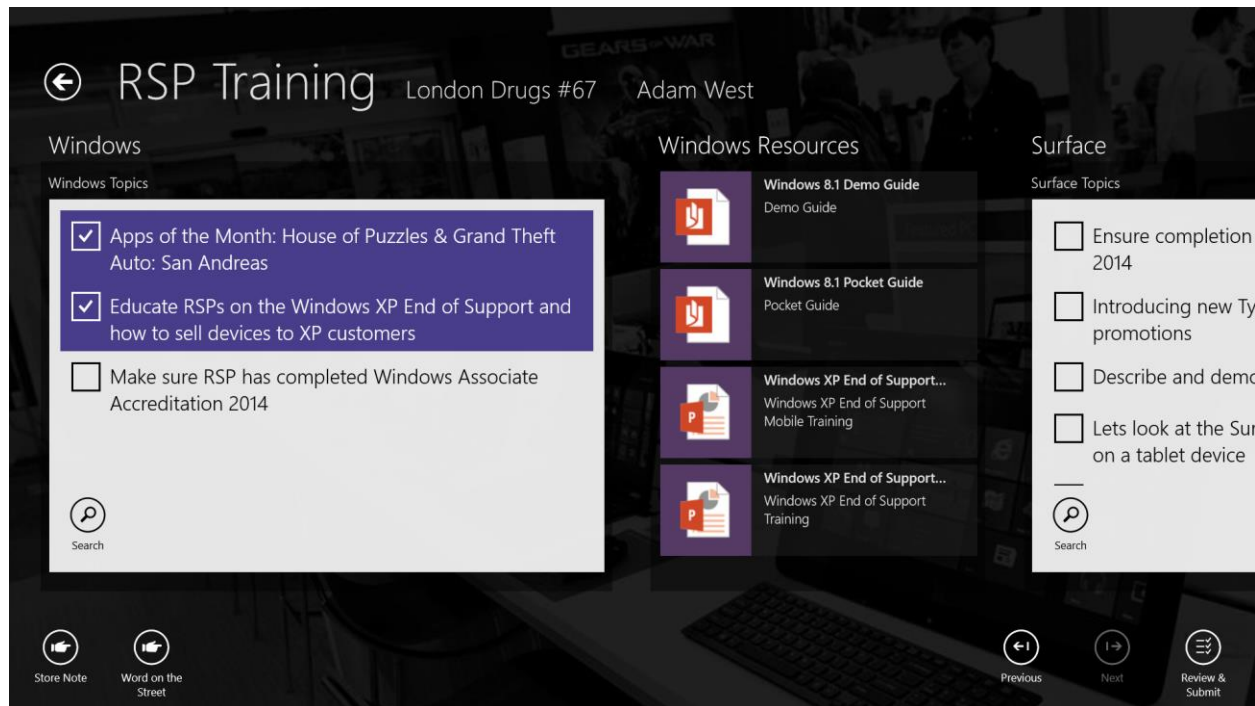
General
General Topics

☒ Make
☒ Enco
Mob

Store Note **Word on the Street** **Previous** **Next** **Review & Submit**

The first section on the left contains details for the store employee. If ExpertZone is available in the country, then enter in the ExpertZone ID. Currently, only manually entered information for ExpertZone accreditations are available. New RSPs should be shown the **Privacy Statement**, and sign in the **Signature** field.

Scrolling to the right, there are monthly training items for each category (Windows, Office, Surface, Xbox and PC Accessories). To the right of each section of training topics, there are associated resources that can be used when training the RSP. There may not be a resource for each training topic.



Click the training topics that have been shown to the RSP and select **Review & Submit** from the bottom right to review the training that was performed. Click **Submit** to send the training report to the server.

The history of training for the RSP is maintained. On the next visit, they can be trained on any of the remaining topics.

Appendix A – Troubleshooting

For issues with the application: missing call reports, breaking news, etc. Follow the steps below:

1. Verify the 10 digit ID (a manager can provide the ID)
 - a. Open the **Settings** charm
 - b. Click on **Preferences**
 - c. If the ID is incorrect, click on **Update ID** the app will refresh after the ID is changed.
2. Manually refresh the application
 - a. Click on the **Settings** Charm.
 - b. Click on **Preferences**.
 - c. Click on **Refresh Now**.
3. If refreshing doesn't solve the problem, close the App
 - a. With a keyboard: press **Alt and F4 keys**
 - b. Without a keyboard: drag the app to the bottom of the page and **holding** it there until the tile flips over.
 - c. Restart the REP App
4. **Diagnostic**; If closing and reopening the App didn't fully update
 - a. Click on the Settings Charm and click on diagnostic and send it
5. **Website** – Verify internet access to the REP server
 - a. Open internet explorer and open the website (<https://www.msftreps.com>)
 - b. If the login page appears internet access is working.
 - c. If not escalate the issue to a manager.


Preferences

ID
Enter your ten digit user ID number.

896745326

Update ID

Refresh Data
Updated data will be automatically delivered from the server when there is an internet connection available.

Refresh Now

Refreshing Shortly
Last Refreshed 11/21/2013 1:05 PM

Location Services
Location services can be enabled and disabled in the Permissions pane.

Outbox
The outbox contains data that is scheduled to be sent to the server.
The outbox is empty.

Show Outbox