



# Your sales force, under control

Optimo SFA — Sales Force Administration

Pre-sales · Van-sales · Distribution & collections

Optimo SFA is a **sales force automation system** that controls the operational functions of the sales, distribution and collection team—from order taking to delivery—. It is a **strategic tool to increase profits**, with an app for Android and Windows Mobile.

## Pre-sales

Order taking on the route

## Van-sales

Sell and deliver on site

## Collections

Distribution and payment

## KPIs

Market feedback

## What does Optimo SFA solve?

- ✓ Eases decision-making with field information.
- ✓ The sales team takes on a more strategic role.
- ✓ Controls sales management end to end.
- ✓ Provides feedback to the sales rep.
- ✓ Reduces administrative tasks.
- ✓ Automates discount and bonus policies.
- ✓ Improves the level of customer service.
- ✓ Controls routes, times and visit compliance.

## Optimo SFA modules

### 1 Pre-sales

Order taking during the visit, with catalog, prices and stock, to prepare the later dispatch.

### 2 Van-sales

Sale and delivery of product directly at the point of visit, with on-the-spot invoicing.

### 3 Distribution & collections

Management of deliveries and route collections, matching payments to the corresponding invoices.

### 4 Surveys

Field market-information capture through configurable forms.

### 5 Discounts & promotions

Automates the application of discount and bonus policies during the sale.

### 6 Lookups & KPIs

Dashboards and queries to track team and market performance.

### 7 Route tracking log

Traces the seller's route to control coverage, times and compliance.

### 8 Settlements

End-of-day closing for the seller, accounting for sales, deliveries and collections.

### 9 Tele-sales

A phone sales channel integrated into the same order and collection flow.

### + Inventory reservation\*

Reserves inventory for customers or channels.  
*\*Integration with Optimo WMS.*

## Integration

Optimo SFA integrates through **web services** or **Excel files** with the customer's ERP, pulling deliveries, accounts receivable and any other relevant information. It also features **native integration with Optimo WMS** for inventory reservation.

## Benefits of implementing SFA

### Optimizes route work

Improves the work of route sellers and increases the number and quality of visits.

### Real-time information

Permanent, dynamic market feedback for better strategies.

### Lower administrative cost

Eliminates data entry, form printing and manual survey tabulation.

### Better decisions

Reliable field data that speeds up commercial decision-making.

## Companies that have used Optimo SFA

DISZASA

CIMBERTON

COMERSAL

Grupo Steiner

GUMARSAL

CRIO Inversiones

Operadora Logística Salvadoreña

Urbano Express

ELICA

## Power up your sales force

Request a demo and see Optimo SFA in action.

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