



**Yosemite Software Solutions** 

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# Sales Rep's Assistant

Considerably more than just an Equipment Configurator

## Sales Rep's Assistant

### About our software

Actively used since 1994, SRA was created to match the needs of the lift truck industry. We work closely with our customers to ensure their needs are met so that your sales team can focus on customers while creating accurate quotes you can trust.

### Features and Benefits

- Consistent quotes and financials across your sales team
- Customized tables
  - SRA can be customized with your dealership's specifications and manufacturer model requirements
  - Freight in and freight out tables can be customized and pre-populated with dealer specifications
  - Dealer prep., discount, margin, markup, local dealer add and miscellaneous tables can be customized and pre-populated with dealer specifications and requirements
  - Battery & charger discount tables can be customized and pre-populated with dealer specifications and requirements (set up per model)
- Automatic updates
  - SRA's automatic updates ensures that your sales team always has the current manufacturer pricing, models, and options in the program
  - Automatic updates ensure that the SRA software and the tables are kept up to date
- Equipment Worksheet
  - Customer information can be imported from CRM or Excel spreadsheet
  - Key sales metrics can be record in the program for up to the minute sales reports
  - The SRA configuration engine with built-in logic is intuitive so that quotes can be created with simplicity, speed and accuracy
  - The SRA configuration engine ensures that only the available options are selectable in order to greatly minimize the potential for errors
  - Add your own custom equipment or services in dealer adds
  - Automatically add customizable, pre-configured outside warranties
  - SRA automatically calculates margins, discounts and sell pricing
  - Alternate options can be added to quote (Alternate options are not included in the amount of the quote but listed on the proposal as recommended by the salesperson. SRA automatically calculates the discounts & sale price for these alternate options.)
  - Accessories and allied items can be added to the worksheet

- Battery Worksheet
  - Easily add the correct battery and charger for electric trucks
  - Built in logic, selects only the batteries & chargers compatible with the selected model quoted
- Financial Worksheets
  - Imports information from the equipment and battery worksheets automatically
  - Clearly defined information, providing a breakdown of costs
  - Enter in trade-in information, firm price, and/or sales taxes
  - Customized finance, lease and maintenance information can be imported and fine-tuned in your customer proposals
- Used Equipment
  - Dealer used equipment inventory can be uploaded into SRA
  - The inventory is accessible through your entire organization by our automatic updates.
  - Creates consistent, professional proposals using your company templates
- Generic Worksheet
  - Using this free form worksheet you are able to sell any items that do not need a configurator (e.g. racking, parts, batteries)
  - Able to use the benefits of SRA with the customer input into the worksheet, and the customer proposal
- Professional Quotes and Proposals
  - Converts worksheets to a professional proposal for your customers
  - Customizable templates using Microsoft Word
  - Include your company logos, pictures, and contact information
  - SRA automatically adds the salesperson's contact information
  - Add additional information such as brochures or pictures to create additional sales opportunities
  - SRA is able to produce a fleet proposal for up to 10 different models
  - Specific template can be set up for each product line
- Custom lease and finance packages
  - Designed & updated by individual dealerships
  - Finance rates can be designed with different rates for Equipment, battery, charger, attachments, and dealer add items
- Sales Order
  - Convert your worksheets to a standardized sales order for your accounting department
  - Consistent information and format allows quick access to financial information
  - Summarizes all aspects of the deal

- Factory Order
  - Able to create a factory order automatically out of the program
  - Summary of only the items to be ordered from the factory
  - Feature is password protected, not everyone has this permission
  - The factory order is customizable per manufacturer specifications
- A variety of reports can be exported to Excel, PDF, .rtf, XML, or HTML
  - Reports can be run by any date range, and any product line
  - Sales forecast
  - Sales by manufacturer, salesperson, or ITA class
  - Quote activity
  - Sold quotes
  - Customizable report, Worksheet Summary
- Integration with your CRM
  - Share contacts and worksheets across your organization.
  - Customer information brought automatically into SRA
  - Existing ERP, customer information can be imported into SRA
- Reduced Capacity/De-rate Calculator
  - An industry standard calculator to provide reduced capacity based on the attachment specifications
- Full service support included with your software
  - Contact us by phone or email for dedicated support
  - Tutorials available in the SRA program
  - Help file in the SRA program
  - Assistance can be requested from within SRA
  - On-site personalized training available
  - Training and demonstrations on our YouTube channel
- Flexible Software Installation
  - Local desktop or laptop installs for portability and offline use
  - Server installation for consolidated reporting and worksheet access by managers
  - Use Windows Remote Desktop Services, VMware ThinApp, or Citrix XenApp to access SRA from devices such as a tablet anywhere you have network access
- Archived Price Book
  - Allows quoting using older price books
  - Used when you wish to fulfill contracts for equipment after manufacturer updates pricing
  - Re-create proposals and sales order for reference or archiving

○ Other Features

- Able to attach files to the worksheet file with all the paperwork that pertains to the deal in one package
- Customized and/or pre-designed notes can be set up in SRA to be used multiple times and attached to the worksheet
- SRA links to Google Maps to show directions to the customer's location.
- A site survey can be built in to SRA
- Built in calculator
- You can set required customer fields
- We can push out pictures, PDF files, templates, preferences, local dealer adds, local alternate options, custom descriptions, finance & lease plans, maintenance, customer database to your sales staff thru SRA
- We can make any other price books that you are interested in
- We make custom battery books for your own batteries
- Easy to manage, needs only one person to administer

The bottom line is that we have made the quoting and order process more efficient so that you can focus on engaging customers and increased revenue rather than wasting effort on administrative tasks.