

# Field Sales done efficiently

OptiFS streamline your sales efforts so you can provide a great customer experience.

A hand is shown holding a string that is attached to a wooden sign. The sign has the text 'SORRY WE ARE CLOSED' and 'PLEASE COME BACK AGAIN'. The background is a blurred image of a person's face, overlaid with a blue tint.

**SORRY**  
WE ARE  
**CLOSED**  
PLEASE COME BACK AGAIN

**Optimate**

# Your Field Sales Management solution

- Smarter management of your Field Sales activities in Dynamics 365 CRM.

If your salespeople have ongoing sales visits with their customers, you know that it requires a structured and persistent approach. But did you know that with the right system, salespeople can get more effective and get an easier everyday life?

OptiFS helps you get the most out of your Field Sales activities. The solution collects all relevant data in one place so that your sales people have a complete overview of who to visit and why.

## With OptiFS You get:



Overview with customer data in one place

- > With OptiFS, you can segment customers, manage visit intervals and campaign efforts. You are also able to prepare orders/offers.



Visitor planning based on customer category

- > Based on your customer categories, OptiFS schedules customer visits, so no customers are forgotten - you specify the time frame.



Visiting Index - which provides quick overview

- > OptiFS continually updates each customer's visiting index so that sales people always have an overview of how often customers are visited.



Campaign efforts as part of your visiting planning

- > If the seller has visited the customer as part of a campaign, OptiFS automatically takes this into account when planning ongoing visits.



Full flexibility and data at your fingertips

- > You define your own rules - both regarding visit intervals, segmentation, etc. Data is available on mobile, tablet and PC.



An atypical consulting company

We are called digital troubleshooters - and most call on us when the others who are immediately similar to us are waving the white flag and have given up. Because they maybe look like us, but there is a world of difference. We are a team of competent specialists. Focus is always on your business, goals and terms in building your solution.

**Optimate**