PRODUCT PRESENTATION · OCTOBER 2026

Plan, visit, close.

All in one app.



YS Field Sales Platform – the app for sales and field teams

ys-sales-route.com

© 2026 YS – Sales. Route. Success. · ys-sales-route.com

THE PROBLEM

In sales, your head is always full

Information is scattered

Notes, phone, Excel, emails: before the visit there is no overview of the customer.

Reports after hours

Visit reports are written in the evening from memory instead of at the customer.

Promises get lost

What was promised to the customer is forgotten or done too late.

Planning routes takes time

Who is due, in which order? It is planned by hand every day.

© 2026 YS – Sales. Route. Success. · ys-sales-route.com

THE SOLUTION

For every customer, YS shows at a glance:

1

What was discussed

2

What is still open

3

When the next visit is due

From first contact to closing the deal: planning, visits, quotes and reporting in one app, for your sales team, nationally and internationally. On iPhone and Android on the road, on the computer in the office.

© 2026 YS – Sales. Route. Success. · ys-sales-route.com

A WORKING DAY WITH YS FIELD SALES PLATFORM

From the first appointment to the quote. In one app.

07:30 **Plan the day** All of today's appointments, the morning summary on the phone at a time you choose.

08:00 **Drive the route** Stops in order, optimised by driving time if you like, navigation with one tap.

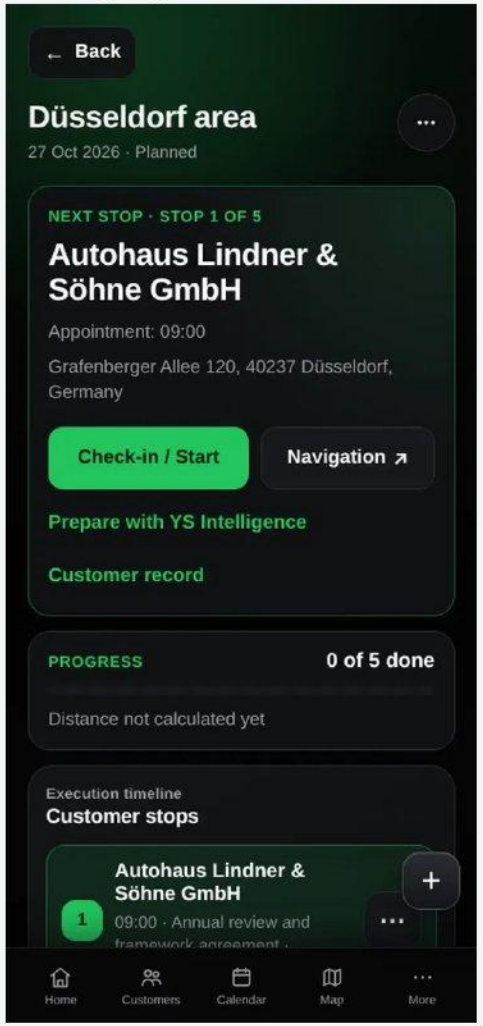
09:15 **Open the customer** Contacts, history, open tasks, opportunities, customer class A/B/C, next visit due.

10:00 **Run the visit** In four steps, notes and photos on site, even without a connection.

10:45 **Debrief** Speak instead of typing. YS Intelligence summarises and suggests next steps.

15:30 **Send the quote** Quote with line items as a PDF or link to the customer.

17:00 **Close the day** Visits documented, follow-ups set, managers see where things stand.

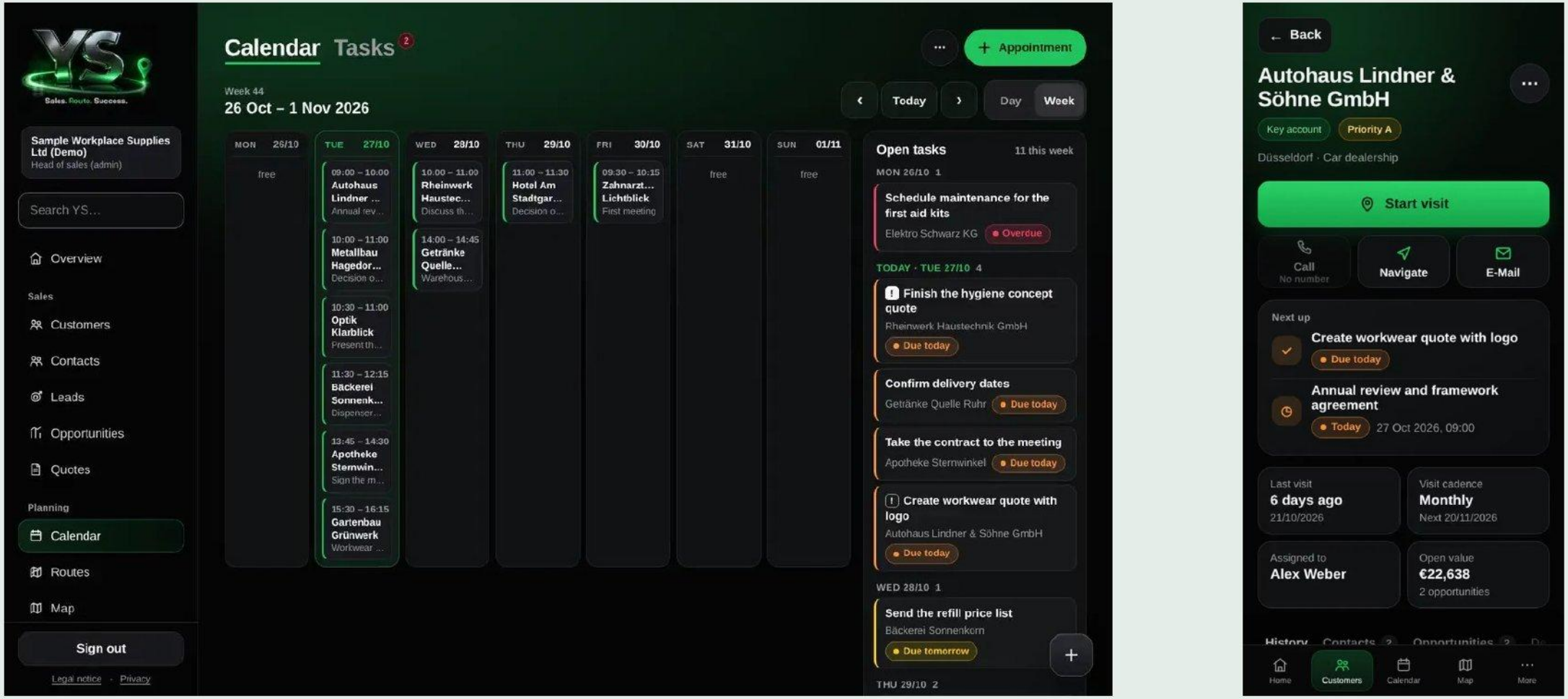


Real screens of the app from the demo company; all names and data are invented.

© 2026 YS – Sales. Route. Success. · ys-sales-route.com

WHAT YS LOOKS LIKE

On the computer in the office. On the phone on the road.



Left: calendar and open tasks on the computer. Right: customer file on the phone. Demo company with invented sample data. Runs in the browser, no App Store.

© 2026 YS – Sales. Route. Success. · ys-sales-route.com

YS INTELLIGENCE

Customer insight at the push of a button.

BEFORE THE VISIT

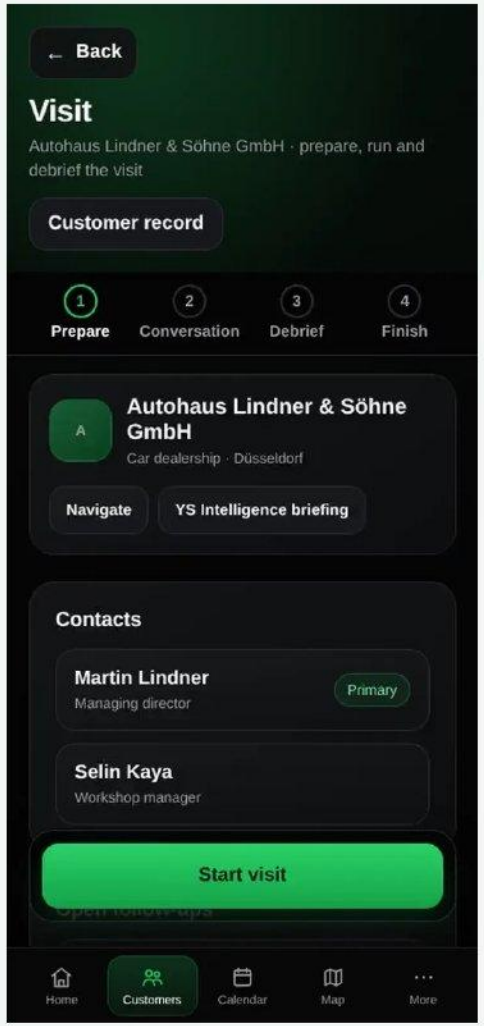
Customer briefing: Open tasks and opportunities in a short summary, plus three suggestions for the conversation.

AFTER THE VISIT

Voice report: Speak instead of typing. YS Intelligence writes the visit report and suggests a follow-up, the next appointment and tasks.

IN BETWEEN

Ask YS Intelligence: What is on today? Which customers are overdue? How are my opportunities doing?

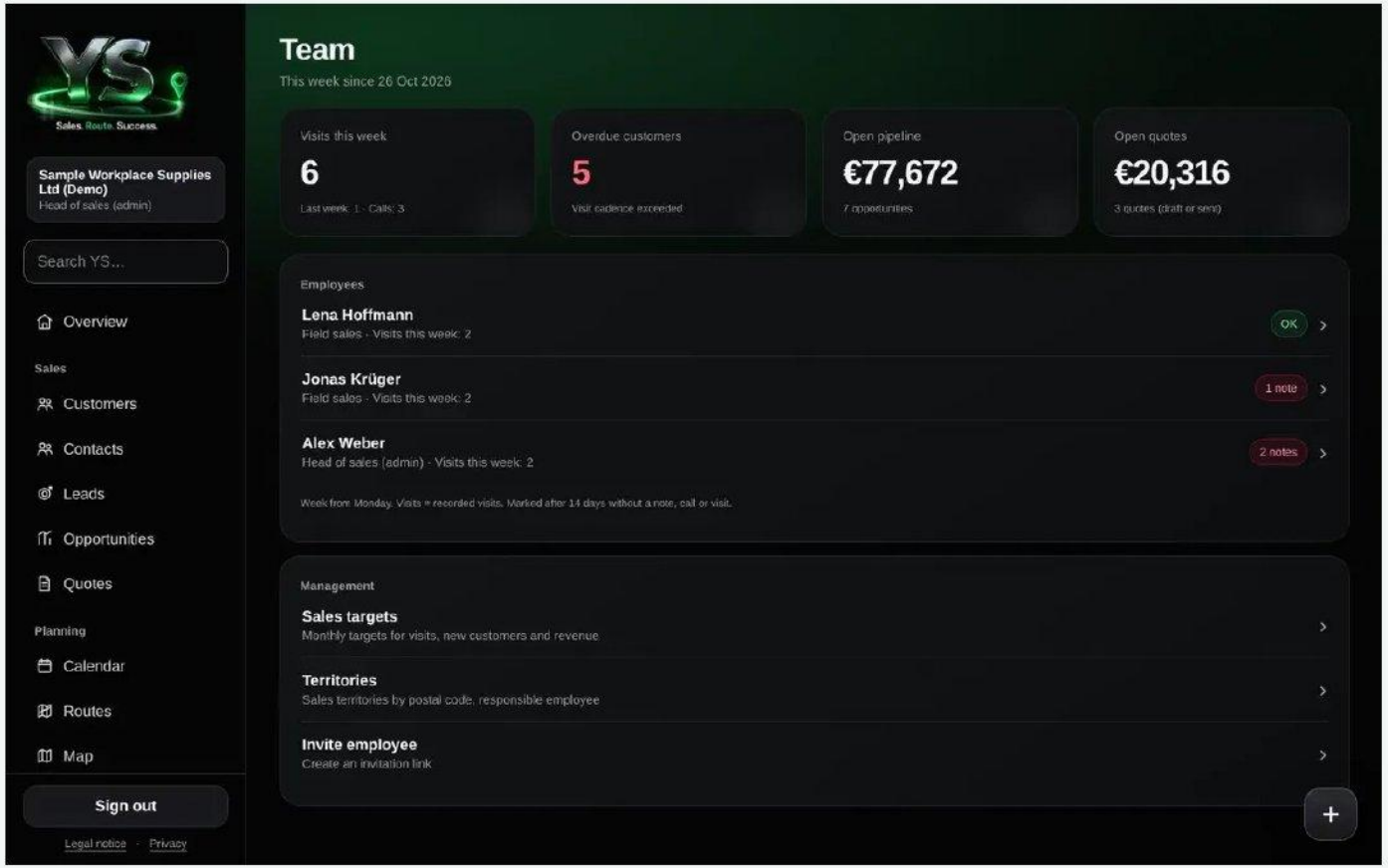


- ✔ Only what the user confirms is applied.
- ✔ YS Intelligence only sees what the user is allowed to see.
- ✔ Built on leading AI models, including Claude by Anthropic.

© 2026 YS – Sales. Route. Success. · ys-sales-route.com

FOR THE HEAD OF SALES

Know where the team stands. Without asking around.



The team at a glance

Visits this week, overdue customers, open opportunities and quotes.

Sales targets

Monthly targets for visits, new customers and revenue, per rep and team.

Territories

Sales territories by postal code, hand customers over to another rep.

Reports

Reports by rep, territory or month, export to Excel.

Real screens of the app from the demo company; all names and data are invented.

© 2026 YS – Sales. Route. Success. · ys-sales-route.com

FEATURES

What YS Field Sales Platform does

Customers and contacts

Customer class A/B/C, visit cadence with “overdue”, call and navigate with one tap.

Week planning and routes

YS spreads due customers across the week around fixed appointments, A customers first.

Visits on the go

Record the report right at the customer, even without a connection.

Appointments and tasks

Reminders and a morning summary on the phone at a time you choose.

Quotes and opportunities

Opportunities with value and probability, share quotes by link.

Trips and mileage

Log trips for your own records and expense claims.

© 2026 YS – Sales. Route. Success. · ys-sales-route.com

INTEGRATIONS

Seamlessly connected to your tools

Data flows where you need it. No double entry, no switching between systems.

CALENDAR AND TEAMS

Microsoft 365

- ✓ Appointments in Outlook
- ✓ Meetings in Teams
- ✓ Customer list from OneDrive

ACCOUNTING

Lexware Office

- ✓ Import customers
- ✓ Articles in quotes
- ✓ Hand over quotes as drafts

ACCOUNTING

sevdesk

- ✓ Customers with addresses
- ✓ Articles and prices
- ✓ Hand over quotes as drafts

IMPORT AND EXPORT

Excel and CSV

- ✓ Import customer lists
- ✓ Reports, tasks, trips
- ✓ Export custom reports

NAVIGATION

Google & Apple Maps

- ✓ Address with one tap
- ✓ The whole day's route
- ✓ On iPhone and Android

CUSTOMER COMMUNICATION

Email & WhatsApp

- ✓ Share quotes by link
- ✓ Send appointment confirmations
- ✓ Calendar file for the customer

The company switches each connection on itself and can disconnect it at any time. Credentials are stored encrypted. YS does not read emails.

© 2026 YS – Sales. Route. Success. · ys-sales-route.com

SECURITY AND DATA PROTECTION

Your customer data stays your customer data.

Servers in Frankfurt

The app and the database run in Frankfurt am Main (EU).

Each company on its own

Each company only sees its own data, checked automatically with every change.

Roles and permissions

Reps see their customers, admins the whole company. Only an admin can delete.

Change log

Admins see who changed what and when.

Two-factor sign-in

Optional per user, with an authenticator app and recovery codes.

Encrypted credentials

Access to Microsoft 365, Lexware Office and sevdesk is stored encrypted.

© 2026 YS – Sales. Route. Success. · ys-sales-route.com

PILOT PHASE

YS Field Sales Platform is in its pilot phase.

We are looking for selected companies

They try YS with their team in everyday field sales work. Their feedback goes directly into further development.

Let us know you are interested, with no obligation:
support@ys-sales-route.com

MARKET LAUNCH AND PRICING

- ✔ YS Field Sales Platform is not yet commercially available.
- ✔ We will set the scope and pricing based on the pilot phase and publish them before the market launch.
- ✔ Terms for the pilot phase are agreed individually.

Participation is subject to individual agreement. There is no entitlement to participate.

© 2026 YS – Sales. Route. Success. · ys-sales-route.com

STATUS AND WHAT I AM LOOKING FOR

Bringing YS into everyday work together

Status today: the app is fully developed and running. It is in its pilot phase, a closed test phase (beta), and not yet commercially available. Personal demo access with sample data by invitation.

Feedback

What costs your sales team the most time and nerves today? What is missing in YS?

Pilot companies

Companies that try YS in everyday work during the pilot phase and report honestly. Terms agreed individually.

Partners

Networks, associations and advisory bodies that would like to present YS to their members.

© 2026 YS – Sales. Route. Success. · ys-sales-route.com

CONTACT

Let's talk.

Yama Sarferaz

support@ys-sales-route.com

Demo and pilot access on request

ys-sales-route.com

linkedin.com/company/ys-sales-route

Oberhausen, North Rhine-Westphalia, Germany



© 2026 YS – Sales. Route. Success. · ys-sales-route.com