Business Management Software for Kubota Dealers

History

Charter Software Inc. was founded in 1978 by our current President/CEO Anne Salemo's father, Gerry Fricke. Anne joined the business in 1988 and in 1996 purchased the business. Today the business is jointly owned by Anne and her sister, Mary Moyer, with Anne being the majority owner. Charter Software is fully unencumbered, and proud to have been serving the dealer community for over 30 years.

Charter Software partners with servicing dealers to promote mutual success through the use of our technology-based management tools. Our affordable Microsoft-based dealer management software is designed to help our customers flourish by increasing efficiency and profitability. Our flagship product, ASPEN Dealer Management Software, and its mobile companion, A.I.M., is used by hundreds of equipment dealers in North America. We are approved by Kubota Tractor Corporation and partner with the equipment industry's leading suppliers to create streamlined software integrations. We also work closely with industry associations to keep up with the dynamic markets we serve.

In addition to being an approved DMS for Kubota, Charter Software is partnered with over a dozen major agricultural, construction, golf and motorsports OEMs and has parts price list relationships with over 400 more.

Charter Software is the only business system approved by the following associations, which reflects highly on the integrity of Charter Software and how well our product serves dealership association members.

Why You Need a Dealer Management System

A good dealer management system not only streamlines processes and data tracking, it also serves as an important tool that helps you identify and take immediate action on opportunities or weaknesses in the dealership.

Any dealer who is not using a management system is missing out on many opportunities to improve parts, service and sales performance because "If you can't track it, you can't fix it."

Product Information

Basic components of ASPEN Dealer Management Software include:

- Parts inventory and point of sale (POS)
- Unit tracking, sales, and management
- Service work orders, scheduling and management
- Rental fleet contracts and billing, as well as utilization and depreciation management
- Accounting functions including payables, receivables, general ledger and payroll
- Integrated CRM so you can manage all customer contacts and records
- Internal workflow, task management and messaging that support multi-tasking
- Accessible data and drill down reporting
- All existing and future Kubota integrations

Some dealers who are new to having a business system opt out of the accounting and rental components which allows them to implement a dealer management system at a much lower cost. This is a very common solution for those customers who want to continue to use Quickbooks for their back-office functions. In fact, Quickbooks is our most common conversion for those dealers who are under eight employees.

Why Our Customers Choose Us

Charter currently services over 400 dealer owner groups with over 6,000 licensed users. Our customers range from having 1 location with 4 users to 14 locations with 244 users. They understand that in order to maintain a competitive edge in today's world, they need to be forward-thinking about technology and how it enables their business to grow, and make data-driven business decisions.

Our customers tell us they choose ASPEN for the following reasons:

- **Technology and Ease of Use:** Our Microsoft-based platform is solid and secure and makes it easy for anyone who has used Microsoft Office to learn.

- **Mobile:** ASPEN's mobile capabilities allow employees to operate as efficiently off site as within the office.

- **Integrated CRM Functionality:** Our CRM functionality includes a set of tools designed to work together to improve how you manage and maintain customer relationships.

- **Data Ownership and Accessibility:** ASPEN's powerful SQL database, reporting and integration tools allow you harness the power of your data for better decision making.

- **Flexibility & Expandability:** ASPEN is scalable and flexible. You can configure the software to meet your management needs, customize and save your favorites and search parameters, and easily add a location within minutes.

- **Customer Success Focused:** Our product roadmap is driven by customer requests. Customers regularly tell us they do business with us because we listen and our support is exceptional. We partner with you to flourish.

Watch our customer testimonials at http://bit.ly/aspen-testimonials

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Style And Substance

> **"You know the software is easy to use when you hire interns or seasonal people, and they require little to no training."**
>
> **~ Dealer Principal with four locations and 50 users**

Some business systems look great from the front end, but lack a strong, stable technology core. ASPEN was built from scratch using the latest secure and adaptable technology that allows us to quickly respond to Kubota's new initiatives as well as your needs.

• New employees learn ASPEN quickly, because it has a look and feel similar to Microsoft Outlook. As our customer, Clayton Camp from Kern Machinery, said "You know the software is easy to use when you hire interns or seasonal people, and they require little to no training."

• Built on Microsoft's .NET and web services platforms, chosen by thousands of software applications because it allows our developers to add additional functionality with much less effort compared to other platforms.

• Built-in communications tools allow you to message or assign a task directly from the record or report with hyperlinks, so with one click, the relevant record/report is displayed.

• ASPEN uses SSL (Secure Sockets Layer), the standard security technology for establishing an encrypted link between a web server and a browser, ensuring all data passed between the web server and browsers remain private.

• Charter Software provides a cloud-based option of ASPEN – a great option if your IT staff is small (or you simply do not want to deal with servers) because no technical expertise required.

• Charter has the highest speed to market on new functionality. Traditionally, we have been able to release new OEM initiatives faster than our competitors due to our web service-based backbone of ASPEN. Since this is the same technology platform new Kubota functionality will be based on, we anticipate introducing new functionality at the same time as the Elite DBS vendors.

Functionality and the stability & security should be at the top of your list when choosing a business management system. These factors, in addition to the ones Kubota used in their evaluation, are critical to your dealership's continued success.

> **"Do your homework, do your due diligence, keep an open mind and you're going to choose ASPEN."**
>
> **– Dealership CEO with 10 locations and 187 users**

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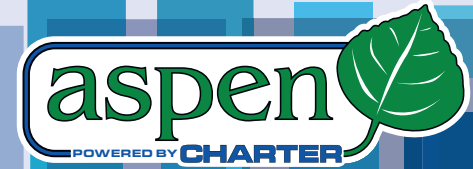
Manage Your Business from Anywhere.

Charter Software is proud to have the best mobile tools in the market. A.I.M. (ASPEN Interactive Mobility), provides mobile access to all the information in your business management system from any smartphone or tablet. No more will you need to make a call or wait until you're back in the office to get the information you need.

• View detailed customer, parts, and units information, as well as equipment and work orders.

• Empower technicians in the field – they can log service hours, check parts inventory, read customer notes, create work orders, upload images and collect payment from the field. They can even log customer interactions using the voice-to-text feature.

• From a customer record in A.I.M., touch the phone number to call, address to get directions, or envelope to send them an email.

• Use A.I.M. to speed up the physical inventory process or access inventory information right from the showroom floor or yard.

• Review invoices and customer interactions on the fly.

• Create, edit and finalize invoices from anywhere.

"A.I.M. is much more efficient, which leads to more profits in the parts and service department. Which leads to better inventory turns in parts, better inventory turns in units. I'm quite enthused about A.I.M."

- Dealer Principal with one location and 19 users

**Learn more about ASPEN Mobile at
chartersoftware.com/mobile-access**

Data Ownership and Accessibility

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Own your data…or else.

Savvy business people know that to take their company to the next level, they must be able to harness the power of their data. Being able to access parts inventories, service orders, invoices and customer records is no longer enough to keep your business growing. You also need to be able to answer questions like "Why isn't my profit margin on this sale what I expected?", "How often is it happening?" and "Where are the opportunities to improve my bottom line?"

ASPEN's powerful SQL database provides varying levels of data access depending upon the user's needs and complexity.

1 Basic Reports

Cover the bases. Provide detailed, drillable data on customers, parts, accounting, units, rentals, sales & service at a managerial level. With over 200 built-in reports across business functions, you can save report settings, export them to commonly used file formats like Excel, Word or HTML and use them to create custom dashboards.

2 Selection Screens

Discover Your Data. Create criteria based data filters that can then be further manipulated. Users choose from large list of criteria, ranging from searches on record fields to the name of the last user who changed the record. Results are shown in an easy to use grid where records can be grouped, sorted and filtered further. Layouts can be customized and saved for later use. Lists can be created from the results and then run through basic reports for advanced reporting on subsets of data.

3 Query Tool

Harness the power of custom reporting. For the ultimate nerd or weekend IT dabbler, access the database schema and definitions as well as a library of pre-designed queries. Modify them or build custom queries that connect you to the SQL database for even more power. If you need help, we can create custom queries for you.

4 Integrator API

Build a bridge between you and your third party systems. Combine your BMS data with information from third party sources using our secure, real-time API (Application Programming Interface). Connect to sources like Salesforce, shopping carts, auction & equipment sites, OEMs, or even email and phone systems. Keep multiple data sources current, increase data accuracy and eliminate duplicate data entries. Run secure, live queries.

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Learn more about ASPEN's drillable data reporting at chartersoftware.com/reporting-analytics/

Integrated CRM (Customer Relationship Management) Tool

Know your customer.

ASPEN's CRM functionality includes a set of tools designed to work together to improve how you manage and maintain customer relationships.

- Email your customers and vendors directly from ASPEN.

- Full contact management so you can easily log all customer visits and interactions.

- Create marketing campaigns by identifying opportunities where customers are only buying from one or more of your departments.

- Ability to quote using quote worksheet tools, track pipeline, won/lost reasons and close rates.

- Seamless integration with MailChimp email platform allows you to professionally design and deliver email campaigns.

- Identify your best customers and opportunities for growth.

- Track, classify and report on customers, sales/quotes, equipment, work orders, etc.

- Understand your customer trends and plan your marketing efforts to maximize revenue.

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Flexibility & Expandability

Get ready to grow.

Whether your company is at a plateau or your company is growing, you need the tools to take it to the next level. You need a Business Management System that makes it easy to jump on new or existing opportunities. Whether it's adding locations, hiring more people, growing the parts & service departments, entering rental, or expanding across market segments, ASPEN is ready to grow when you are.

• Customization without complexity: By configuring the software to meet your specific needs, you can readily get answers to questions that help you improve your bottom line.

• By setting your favorites, configuring your dashboard and saving regularly used searches, you can focus on managing by exception and serving your customers faster and more effectively.

• The built-in tools measure your inventory turns, service efficiency, customer analysis, departmental profitability and other key metrics so you can quickly take action.

• Easily add locations **within 30 minutes** using the attributes of your original/other locations.

• Add components like rental or accounting later as your business requires.

"With ASPEN, I grew my sales twofold and did not add any back-office people."

--Dealer Principal with two locations and 35 users

Customer Success Focused

Not your typical Vendor-Customer relationship.

We partner with you to help you flourish. Most people are not in the habit of changing business systems every year or two. Your decision is a long term one, and our people partner with you for success. Here is how:

- When you sign on with Charter, you are assigned a dedicated Implementation Manager who guides you through the implementation and training process.

- Our Technical Support team is knowledgeable and responsive, responding to 90% of issues immediately.

- Our product roadmap is driven by listening to our customers and adding the functionality they request.

- We hold an annual ASPEN user conference. The schedule is broken out by tracks for each job function, includes roundtables so you can learn from peers, and an open lab with ASPEN experts and trainers.

- Customers rate our trainers highly -

  - 96% agreed or strongly agreed our trainers showed a high degree of knowledge, both about the product and industry, professionalism and problem solving ability.

  - 94% agreed or strongly agreed our trainers were highly skilled with regard to their ability to listen, communicate, deliver valuable information and help people be more effective.

  - 95% of customers said trainers treated them well, made them feel important, showed interest in their business and were easy to do business with.

    An independent survey ranked Charter Software Support "Very Good" to "Excellent" in all aspects of customer service, support and product satisfaction. We know our customers and offer personalized service.

Learn more about our training and support at http://bit.ly/aspen-training

ASPEN Kubota Integrations

ASPEN's Kubota Communication Interface saves dealers hours otherwise spent in parts lookup, order processing, accounts payable and re-keying data!

Kubota iKQ (Integrated Kubota Quoting) Integration

ASPEN's iKQ integration allows you to view ASPEN customers from within iKQ, add inventory items from ASPEN to the iKQ quote and import quotes into ASPEN from iKQ.

Kubota Locator Integration

Upload parts inventory to Kubota for visibility to other dealers using ASPEN's Kubota Locator.

Kubota Invoice Download Integration

Save hours in manual entry by using ASPEN's Kubota Invoice Download interface to pull KOARS invoices into ASPEN. Easily process parts packing lists, whole goods invoices, warranty credits, etc. in ASPEN.

Kubota K-PAD Integration

- ASPEN connects to K-PAD, so you can see your own parts information including bin location, quantity and pricing and supersession information right on the basket screen, along with Kubota depot availability. No need to go back and forth between K-PAD and ASPEN to see if you have the parts you need.
- Simplify your work order, invoicing and parts ordering processes by creating parts pick lists in K-PAD's Shopping Basket, and with a just a few clicks, transfer these lists to parts invoices, parts orders or service work orders.
- Reduce errors caused by making entries in multiple systems.

Kubota Flat Rate Schedule (FRS)

Reduce work order entry times and improve billing accuracy by adding Kubota repair times to an ASPEN repair order.

Kubota Price Updates

With ASPEN's integration with Kubota price updates, you'll never need to look up pricing or re-key part numbers. Kubota Dealers can download price file updates and supersession information directly into ASPEN, always keeping pricing up to date. No need to look up or re-key part numbers—with one mouse click, add the part number, description, return code, package quantity and pricing to your inventory file.

KubotaLink Integration

- Check parts availability at Kubota parts depots, as well as other Kubota dealers.
- Submit parts orders to Kubota from within ASPEN's parts order screen without any log-in or additional steps.
- Search for prior orders and check the status of orders.

Save Time & Reduce Errors

Eliminate Double-Entry

Improve Parts Fills/Turns

Streamline Parts Ordering

For more information, see chartersoftware.com/kubota

Kubota Dealer References And Contacts
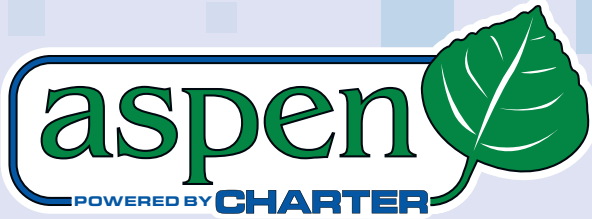
Roughly half of the dealers that see a demo choose ASPEN. These numbers prove ASPEN has the tools that forward-thinking Kubota dealers seek. We sincerely hope you'll contact us so we can learn more about your business needs and how we can help you take your dealership to the next level.

Contacts

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References

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Lano Equipment
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For more detailed information please visit

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