



The Nexterna™ Clearview Quotes & Sales Orders module allows users to manage the entire sales cycle of the products and services they offer. Information flows easily from Quotes to Sales Orders through an approval process. Sales representatives will have the functionality necessary to service their customers efficiently.

Overview

The Nexterna Clearview Quotes & Sales Orders module provides advanced functionality in four key areas: pricing; quotes and sales orders; picking, shipping, and tracking; and billing.

Pricing

Multiple pricing and discount structures can be established. List pricing is set-up against the item master and is specific to a currency rate.

Categories make it possible to quickly customize this pricing for customers. Price adjustments may be set-up by item, item group, and quantity. These adjustments can be discounts or up-charges based on your criteria. Future pricing capabilities are also available to set-up promotional pricing.

- Create multiple pricing and discount structures
- Develop rate categories for custom pricing
- Apply discounts by item, product, and quantity
- Manage future price increases and reductions

Quotes & Sales Orders

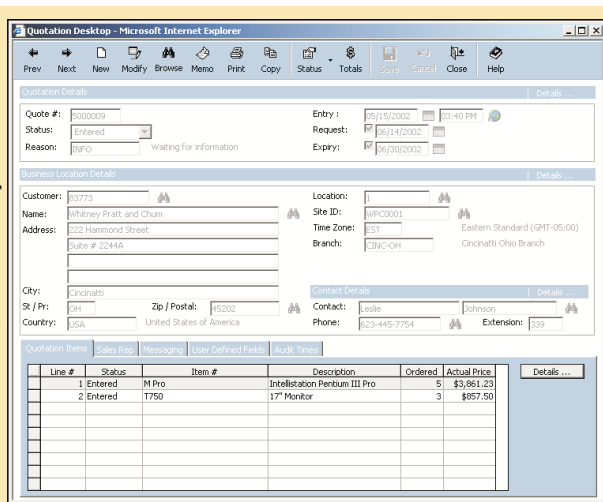
Quotes can be developed for existing customers, as well as prospective ones. Each quote features a built-in approval process and expiration date consistent with company business practices. Once approved, quotes are converted to sales orders with the touch of a button.

- Convert quotes to orders with a single key stroke
- Build-in expiration dates and approval requirements
- Automate cost allocations and commission splits

Picking, Shipping & Tracking

Picking, shipping, and tracking of product being sold will streamline the entire inventory logistics process. By centralizing inventory details, sales representatives are able to quote and sell items out of any stocking location.

Nexterna Clearview Quotation Desktop



At the creation of a sales order, items can be automatically allocated, or back-ordered if requested product is not available. Despite its automated capabilities, the process is flexible enough that items can be issued and serial numbers chosen at any point. Orders can be set to ship partial or complete, according to each customer's preference. All shipment details are recorded on the picking list and/or packing slip. Serialized items will be tracked in the Product Desktop and linked with the Ship To Customer Location on the Order upon completion of the shipment.

- Control inventory logistics
- Manage serial and lot controlled items
- Allocate items where you need them most
- Ship partial or complete orders
- Track shipments and serialized product
- Product tracking with warranty entitlements automatically applies

Billing

Sales billing is triggered by every shipment so invoices for partial or complete shipments may be generated. Optional consolidated invoicing by billing location or for customers with multiple sites, location level invoices can also be created. Invoices can be easily exported using our XML interface tool, Nexterna Clearview Link.

- Immediately bill for orders upon shipment or allow for consolidated shipments on an invoice
- Generate invoices at the location level
- Easily export financial data

Benefits

The Nexterna Clearview Quotes & Sales Orders module provides advanced functionality for handling multi-level pricing, converting quotes to sales orders, managing shipments and billing customers. It provides universal access to key information, giving companies the ability to handle orders more quickly, improve shipping and billing accuracy, and deliver a higher level of customer service.

The screenshot shows the 'Sales Order Desktop' application in a Microsoft Internet Explorer browser window. The interface is divided into several sections:

- Sales Order Details:** Includes fields for Order # (2020013), Status (Entered), Reason (N/A), Entry (25/10/2002), and Request (25/10/2002).
- Business Location Details:** Includes Customer (32773), Name (Whitney Pratt and Clark), Address (222 Hanwood Street, Suite # 2244), City (Cincinnati), Country (USA), Location, Site ID (MPC000), Time Zone (Eastern Standard (GMT-05:00)), Job # (Test Job 1), Branch (CINC-OH - Cincinnati Ohio Branch), Contact (Judson), and Phone (513-445-7794).
- Table:** A table with columns: Line #, Status, Item #, Description, Ship To, Ordered, and Actual Price. It contains two rows:

Line #	Status	Item #	Description	Ship To	Ordered	Actual Price
1	Entered	M Pro	Intelstation Pentium III Pro	1	10	\$3,723.68
2	Entered	1750	17" Monitor	1	5	\$850.94

About Nexterna

Nexterna, Inc. provides wireless mobile resource management solutions that help Field Service organizations increase productivity, lower operating costs, and improve customer satisfaction.

About Nexterna Clearview

Nexterna Clearview is a complete field service management application that is seamlessly integrated with GPS tracking and mobile communication systems. The Nexterna Clearview system is fully web-based, wirelessly enabled, and includes integrated mapping. It allows field service technicians to work together in real-time with the central office.

The Nexterna Clearview web-based application includes in-depth modules for service order management, sales order management, call avoidance, optimized dispatch with integrated mapping, contracts and preventative maintenance, product/asset tracking, and logistics and reverse logistics.

The Nexterna Clearview application can be deployed as part of a complete real-time service management system that includes the following optional modules: integrated mobile service management software, field web access, customer web access, data import/export, wireless data connectivity, and real-time vehicle location using GPS technology.

Learn more at www.nexterna.com/clearview