



Product Overview



Build Consistent Proposals, Quotes, Contracts

- > Is your sales team challenged to consistently quote on complex broadband and wholesale communications service offerings?
- > Is pre-sale information collected by teams of sales reps or agents on multiple spreadsheets making it difficult to organize during the quote-to-customer process?
- > Is it time consuming for supervisors to manage the quote review and approval process?

The complex quote process requires a disciplined procedure to produce an easily understandable quote for prospects. It requires logic to preserve prospect data and requirements passed on to the billing and customer management system when the contract is signed. The Quote Builder Module facilitates the quote-to-customer process for today's communications service providers.

Pricing

Standard 'base pricing' is configurable to meet your company's multiple service offerings or markets served. Pricing can be based on the following variables:

- Tiered Pricing – designate from 1 to 10 tiers based on your ability to deliver the product and the facilities available.
- Delivery Method – configure pricing based on the complexity of delivery.
- Bandwidth – base pricing on the volume offered.
- Contract Terms – apply discounts based on the length of the contract.

Optional individual case-based (ICB) pricing facilitates offers that don't fit standard base pricing.

Advantages

Quote Builder is a user-friendly web-based application that allows managers to view and approve work in the pipeline.

Consistent Offers | Standardizes the language and professional presentation of each offer, no matter which sales rep or agent writes up the quote.

Price Accuracy | Automatically incorporates current pricing from the billing system based on the prospect's central office. Flexible enough to allow individual case-based (ICB) pricing when the situation demands.

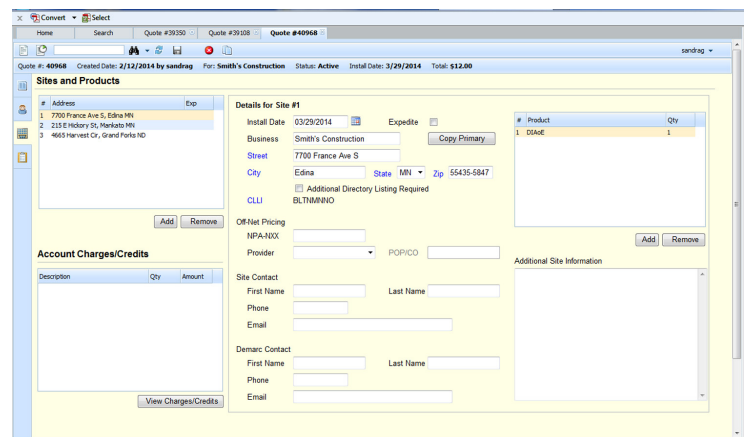
Compatibility Rules | Enforces compatibility restrictions validated by GEO location to only display available options for services and features in that local market.

Procedural Discipline | Step-by-step processes simplify and govern complex procedures to ensure that every prospect receives the same attention to detail throughout the quote process.

Save Time/Reduce Errors | Notifications are emailed to expedite manager approvals or signatures. Static business contract language, such as legal verbiage, is dynamically auto-populated to effectively reduce potential for errors, improve quality, and reduce review time.



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Quote Builder Module Features

Individualized Home Page

User preference settings display the user's quotes on a personal landing page including:

- Last Ten Visited Quotes
- Notes & Reminders
- Saved Searches & Queries
- Open Quotes & Assigned Tasks

Service Plans/Markets

Your service offering is fully defined and pre-entered into Quote Builder to be selected by the sales rep or agent entering the quote. Templates for high volume products and bundles of products facilitate the sales process and assure accuracy.

Copy Function

The Clone Quote button allows users to copy customer information and requote easily, selecting a different set of products or 30-, 60-, 90-day contract terms, for example.

Logos

The database maintains multiple company or subsidiary logos to toggle the correct one for each quote.

ICB Pricing

Users easily select between your standardized base pricing or individual case-based pricing (ICB), as special situations demand.

Promotions/Discounts/Upcharges

Discount and promotion authorization rules are enforced, such as:

- Auto-credits for installation charges after a 3-year contract term is met.
- Discounts tied to a task that requires a manager's approval for specific features or high volumes.
- Upcharges when a customer requests 'expedited installation' over your normally scheduled timeframe.

Workflow Tasks

Pre-defined workflow tasks, based on your business processes, ensure that no steps are missed.

Legal Verbiage

Your business contract language is dynamically auto-populated where applicable to assure consistency in every quote generated.

Comments

Users can key sales notations, project requirements, or capture critical prospect information as comments at the task level.

Attachments

Supporting documents can be attached to specific tasks, such as requirement documents or technical network drawings.

Forms

Custom forms or templates are available upon request.

Data Collection

Vital field information is preserved and transferred to the billing and customer management system when the contract is signed.

Quote History

Previous quotes are retained - whether or not they were accepted by the prospect/customer.

Security Roles

Individual log ins and assigned user roles invoke unique privileges by user. Roles segment users by functions or tasks performed, such as sales reps, affiliated agents, supervisors/managers, and authorized pricing desk staff.

Reports

The database allows standard and customizable reporting by user, by task, or by date to keep users and managers informed. Export reports in .CSV or PDF format.

Workstation Requirements

Microsoft® Windows®

4G RAM or higher

80 GB Hard Drive

.NET Framework



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