



CompassPoint Solutions Advanced Credit

Gain greater control over claims processing

About Us

Green Beacon Solutions partners with clients to implement integrated financial, supply chain, sales automation, and marketing business solutions built on proven Microsoft technologies. Our unique combination of technology, people, and process quickly help identify and implement expert strategies that support our client's business objectives within the distribution, professional services, banking/banking services, and manufacturing industries.

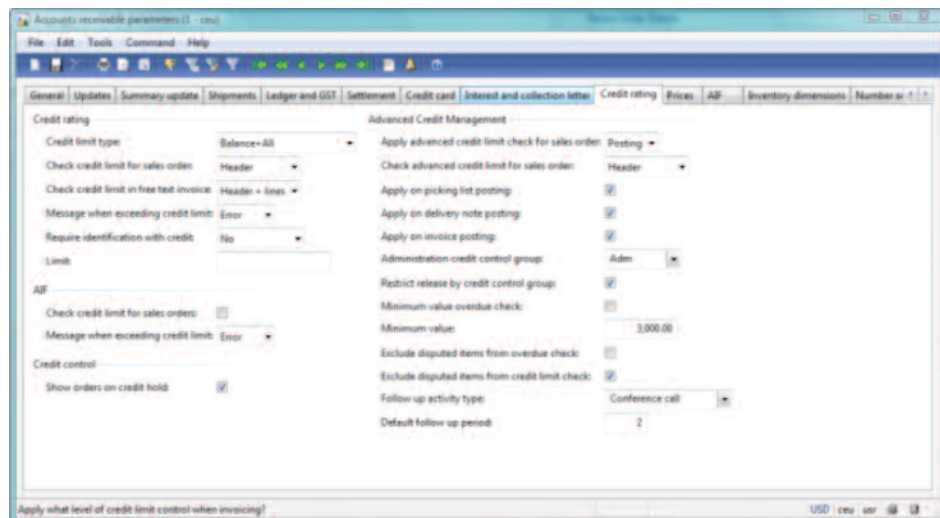
Why Green Beacon?

Our technology and consulting expertise, combined with our success in solving customer issues, have resulted in our unmatched industry reputation. We have an outstanding track record developing, delivering, and integrating ERP, CRM BI and Marketing Automation technology solutions that deliver direct business benefits for our customers.

Improve Cash Flow

Cash flow is vital in today's business environment and effective Credit Management plays an important role in maintaining a healthy cash flow.

In a volatile business environment companies have to assess credit risks constantly and often have various credit control rules in place. Credit Controllers need to identify breaches of trading terms immediately and resolve claims quickly to maintain cash flows.



Reduced Customer Credit Risk

Advanced Credit Management is specifically designed to work with the "Accounts Receivable" module in Microsoft Dynamics AX and automate the credit control rules and authorizations. The Customer Credit Management component of the module reduces customer credit risk and supports fast credit control review and authorization. The Advanced

Credit Management extends the “warning” dates system to a “hold” if the credit limit is exceeded, or credit term exceeds (i.e. overdue transactions).

Fast Resolution of Claims

The Credit Claims Management component supports organizations that have a high volume of sales and credit claims with their customers. The module allows for credit claims to be entered and settled against invoices. This ensures that the open transactions for customers reflect the status expected by your customer and substantially simplifies account management and reconciliation.

When an customer invoice is short-paid pending a credit note, open balances are displayed on customer accounts. The module allows for credit claims to be entered and settled against invoices. This ensures that the Open Transactions for Customers reflect the status expected by your customer and substantially simplifies account management and reconciliation.

All remaining invoices entered in the Accounts Receivable ledger are clearly collectable, improving the collection process. Invoices in the claims system are either subsequently approved and closed, or are transferred back to the Accounts Receivable ledger for settlement.

On credit hold	Sales order	Customer account	Invoice account	Order type	Status	Curren
✓	SO-101411	atet15	atet15	Sales order	Invoiced	USD
✓	SO-101412	atet15	atet15	Sales order	Invoiced	USD
✓	SO-101413	1000	1000	Sales order	Invoiced	USD
⚠	SO-101414	1000	1000	Sales order	Open order	USD
⚠	SO-101415	1000	1000	Sales order	Open order	USD
⚠	SO-101416	1000	1000	Sales order	Open order	USD
⚠	SO-101417	1000	1000	Sales order	Open order	USD
✓	SO-101418	1102	1102	Sales order	Open order	USD
⚠	SO-101419	999	999	Sales order	Open order	USD
✓	SO-101421	1000	1000	Sales order	Open order	USD

Key Features

- Greater administrative control over customer processing with credit approval logic, process and workflow
- Multiple credit limit checks throughout the sales order process
- Reduce receivables exposure
- Actual credit assessment including claims
- Posting is aborted if a trading term is breached, and logged in a credit control table.
- Exceptions logged in the credit control table are displayed in latest to oldest date.
- Parameters to restrict sales, deliveries, transport loads, MRP firming and validation rules

Maintain Microsoft Dynamics AX with Green Beacon's

SmoothSail Managed Services

- Dedicated support staff at our Newton, MA HQ
- On-demand and cost-effective management services for CRM and ERP applications
- Advisory services to increase business efficiency by improving system usage
- Support and maintenance services to reduce down-time and ensure productivity so that systems operate at high availability



- Established in 2001
- Headquartered in Boston, Massachusetts
- Offices in New York, Philadelphia, and Houston
- Specialists in Microsoft Dynamics Business Solutions
- ERP and CRM Consulting Services
- CompassPoint Solution Software Accelerators
- SmoothSail Support & Managed Services

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