



CompassPoint Solutions Product Family Management

Group items quickly and easily

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.

“I was surprised how easy it was for our sales and purchase department to group and categorize items with CompassPoint Product Family Management.”

Why CompassPoint Product Family Management?

CompassPoint Product Family Management groups your entire range of articles into subgroups. Categorizing your articles enables you to perform more specific searches, so items are located faster. You call up the selection of products and select the product required. The system then places the product in the order. This saves time and allows you to answer customer queries more efficiently, because you have an immediate overview of the product range for that particular customer. Orders are also generated more rapidly, because you can select from the product range corresponding to a particular supplier. Your task is simplified, as you only see information about products that are relevant to the situation in question. The stock status in each selection is also displayed.

What is CompassPoint Product Family Management?

The entire range of products in Microsoft Dynamics AX is a static unit. CompassPoint Product Family Management subgroups the entire range of products. These are

dynamic groups. These subgroups, or selections, can be grouped together based on different properties.

There are three categories:

- Selections based on purchase and sales products and other products, such as semi-manufactured goods.
- The supplier's ranges of products.
- The customer's ranges of products.

You link the product to the corresponding product selection. A product can belong to an unlimited number of user-defined selections. For example, with customers who purchase the same products from you every month, you can create a selection containing this customer's products. When this customer places a repeat order, this specific product selection simplifies the order entry. Simply select the products, enter the required quantity and the system places them in a sales order. You can even check the stock status of the selected products. The stock level is up-to-date information, because CompassPoint Product Family Management is fully integrated in Microsoft Dynamics AX.

CompassPoint Product Family Management is not only a "search aid", but also a "data entry aid". When making a purchase order or a sales order, choose the product from the selection and click to add it to the order.

What are the advantages?

CompassPoint Product Family Management offers the following advantages:

- Always up to date information
- Quick searches
- Rapid sales and purchase order entry
- Time saving
- Immediate stock information

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



**GREEN BEACON
SOLUTIONS**

- 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