GREEN BEACON SOLUTIONS

CompassPoint Solutions

Project Relationship Management

Link multiple tenders to a single opportunity

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.

"CompassPoint Project Relationship Management keeps our sales pipeline focused and accurate."

Why CompassPoint Project Relationship Management?

CompassPoint Project Relationship Management enables a number of proposals to be submitted for a single project; proposals for various requestors, as well as multiple proposals for the same requestor. You register the project and add all the accompanying information and proposals to this project. Keeping manual lists of all the details is no longer necessary. The follow-up process of proposals will also be easier, as any superfluous information is no longer displayed. Only the proposals you select continue in the proposal process. The standard Dynamics AX presents an overview of all the proposals, but it does not register all the information concerning potential projects before the contract is attended. CompassPoint Project Relationship Management, however, creates greater transparency, gives an orderly picture of all the information relating to a construction project and shows an overview of proposals and corresponding projects.

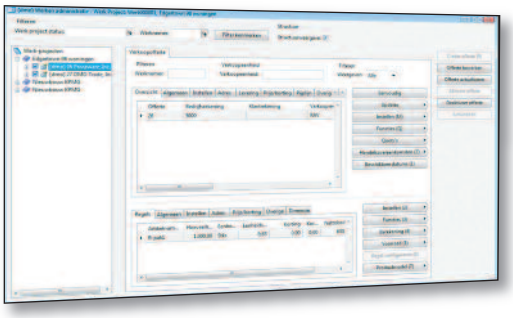
What is CompassPoint Project Relationship Management?

All the information collected concerning a potential project, such as a project description, specification numbers, the customer, the architect, any other parties involved and

more can be entered in CompassPoint Project Relationship Management. Once you receive a request to proposal, simply retrieve the construction project concerned and make a proposal. This can be automatically linked to the construction project.

Other activities, such as enquiring about proposals, can also be linked to a construction project for monitoring purposes. It is extremely useful to know which phase the project is in - the proposal phase, the costing phase or the handover phase- and this can be specified in CompassPoint Project Relationship Management. All the relevant details of one construction project are grouped, giving you clear details of:

- General information (address, specifications number, characteristics, etc.)
- The various stakeholders and their interests



- All project-related activities
- All outstanding and active proposals
- All proposal-related information

What are the advantages?

CompassPoint Project Relationship Management offers the following advantages:

- All quotations relating to one construction project conveniently grouped
- Easy access to all grouped information relating to a construction project
- Multiple proposals can be submitted for the same construction project
- The construction project can be followed in phases
- No superfluous information in the proposal process
- CompassPoint Project Relationship Management is integrated in your system, so information entered in CompassPoint Project Relationship Management is available throughout the entire system

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*