



CompassPoint Solutions Sales Dashboard

Full customer information at a glance

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.

“No more clicking and searching for important business contact information. CompassPoint Sales Dashboard presents all the details in a single screen.”

Why CompassPoint Sales Dashboard?

CompassPoint Sales Dashboard displays all the relevant information about your customers or prospects. Information can be edited easily and you can zoom in with one mouse click. This not only saves time, but also reduces the risk of error. Information about your business contacts is conveniently arranged on a single screen. No need to perform endless searches and click on numerous menus to localize the right section of the program before performing the necessary tasks. The program works in real time, so all the information you see is up to date. You can use CompassPoint Sales Dashboard as the start page for all your activities. It acts as a source of information that displays everything you need. If you require even more detailed information, it can be retrieved from CompassPoint Sales Dashboard.

What is CompassPoint Sales Dashboard?

CompassPoint Sales Dashboard is a clear, structured starting point from where you can work quickly and efficiently. View, edit or alter the information. CompassPoint Sales Dashboard displays information about the business contact, including payment behav-

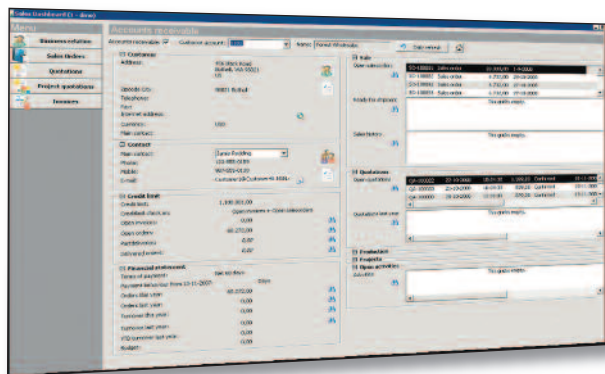
ior, order history and the total turnover. You can also see whether this customer has any outstanding quotations or whether there are any other ongoing activities. From CompassPoint Sales Dashboard, you can edit information and use existing order and quotation lines to create new orders and quotations.

CompassPoint Sales Dashboard also allows you to create a new sales order or a new quotation from the order and quotation archive. You generate a new document based on information contained in existing documents. Saving you time and considerably reducing the risk of errors.

What are the advantages?

CompassPoint Sales Dashboard offers the following advantages:

- Retrieve more information
- Edit data
- Enter new orders and quotations based on existing order and quotation lines



- All the relevant information is conveniently displayed on a single screen
- Zoom in on detailed information with one mouse click
- Saves time and reduces errors
- Information can be edited and modified using CompassPoint Sales Dashboard

- Works in real time, which ensures the information is up to date
- All business contact information displayed on a single screen

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