



# CompassPoint Solutions Enterprise Content Management

Structures document storage

## 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 almost think this was developed especially for me. I never thought I would be able to work with SharePoint and MS Dynamics AX as one solution.”**

## Why CompassPoint Enterprise Content Management?

The volume of structured, unstructured, digital and analog information is increasing rapidly. A myriad of business information, be it important or unimportant, confidential or public, is available in many document formats; drawings, manuals images, quotations, Gantt, Office documents, notes, memos, reports, e-mails. And this data is used by departments at all company levels. The wide variety of documents makes efficient management a highly complex issue. CompassPoint Enterprise Content Management bridges the gap between this unstructured (documents, drawings etc.) and structured data environment (Dynamics AX).

## What is CompassPoint Enterprise Content Management?

Enterprise Content Management has been designed so that each organization can benefit from optimal implementation and a seamless set up to their business needs also studio functions are available. It forms a flexible link between structured and unstructured data and can be linked to more than one Microsoft Dynamics AX record. In practical terms this means that a drawing, for instance, can be opened from the article table, a BOM line, the production order and sales line. Enterprise Content Management

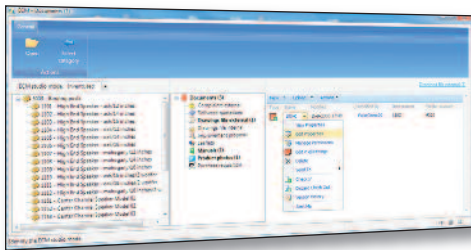
# CompassPoint Solutions Enterprise Content Management

is integrated in the Dynamics AX platform, as well as in the Windows Desktop environment. So each Windows user can upload and download documents without having a Dynamics AX client. Another smart function of Enterprise Content Management is the supplier and subcontractor function, which eliminates the need to e-mail or send hard copies of drawings. This functionality means you only have to send the link to your partner, who can then download and view the latest released version of the product information. ECM has a number of specific building PDM functions, such as product categorization, data approval workflow and multi level checkout.

## What are the advantages?

CompassPoint Enterprise Content Management offers the following advantages:

- Use of all rich SharePoint document management functionality in AX, such as version management, approval profiles, alerts to changes, and workflow.
- Integration with own AX approval workflow for SharePoint documents.
- Powerful “in Document Search Function” in Microsoft Dynamics AX.
- Strong Document Authorization functions.
- Document categorization.
- Strong Studio functions for items, products and projects
- Documents can be attached to a Dynamics AX record without need



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