



VENDOR DEMONSTRATION SCRIPT

VENDOR & PRODUCT OVERVIEW:

- Vendor Information
- Reseller Information
- Primary Product Name & Version
- When Released
- Supported Platforms & Technology
- Key Industries
- Sample Customers
- Modules & 3rd Party Products Demonstrated

NAVIGATION & USABILITY FEATURES:

- Navigation
- Integration with Desktop Products
- Usability Features
- Reporting Capabilities

SALES OPERATIONS:

- Sales Force Automation - CRM
 - Sales cycle & activity management, Lead to Opportunity to Quote to Order flow
- Order & Customer Service Management
 - Create, Copy, update orders, credits/RMAs, blankets, templates, etc.
- Sale & Operations Planning
 - Sale Planning & Forecasting
- Customer Self Service/e-Commerce
 - e-commerce or customer portal

INVENTORY & PROCUREMENT:

- Inventory Management
 - Vendor setup, Item setup, pricing, Physical Inventory/Cycle Count, Lot/Serial Number Control, Costing, Quality, Vendor Scorecards
- Procurement
 - Requisitions, PO processing, blankets, templates, receipt routing
- Warehouse Management
- Transportation Management

MANUFACTURING:

- BOM & Routings
- Requirements Planning
- Shop Floor Control
- Engineering Change Management
- Costing
- Quality Management
- Shipping



VENDOR DEMONSTRATION SCRIPT

SERVICE OPERATIONS:

- Capital Asset Management
 - Assets, Maintenance schedules
- Manage Service Requests
 - Problem determination, knowledge base, Create and track issue
- Scheduling & Dispatch
 - Assign appropriate available personnel
- Field Operations
 - Time & materials entry

FINANCIALS:

- A/R
 - Invoicing, Credit & Collections
- AP
 - Voucher Match, Check Writing, Discounts/Rebates, etc.
- Fixed Assets
 - Asset Master, Depreciation, Disposal
- GL
 - Structure, Integration with other systems, Cash Management, Reporting
- Job Cost/Projects Accounting

WORKFORCE MANAGEMENT:

- Human Resource Management
 - Benefits, Recruiting, Expense Management Self Service
- Payroll