



CASE STUDY

bSure - Credit Review Automation

Abstract

Our Customer is one of the global CPG giants. Their products are sold across 100+ countries through a huge network of wholesale customer, retail customers and third-party distributors.

The customer has a large Credit Review team that was relying on manual processes to conduct periodic credit reviews, customer credit checks, managing the receivables, extending credit limits, etc. Due to the manual processes and humongous paper work, they were facing several long delays in conducting credit reviews.

Vertex Computer Systems rolled out its flagship solution called bSure that has automated the entire process of credit review, created an electronic storage of documents and made the process of credit review just a matter of few minutes.



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Business Challenge

Our customer, a global CPG giant was facing problems in the following areas:

- ✓ Managing the Accounts Receivable (A/Rs)
- ✓ Performing periodic credit reviews of existing customers
- ✓ Credit checks of new onboarding customers
- ✓ Trying to establish a collaboration among different functions involved in credit and risk management for a seamless of process

Vertex Solution



Automated Workflows

Credit Analysis and Reviews;
Multi-level workflows; Credit limit management; Audit Trails



Customer Accounts

Ease of access; Comprehensive search; Quick visibility into high impact customers



Collaboration

Discussion boards & messages;
Task assignment and tracking;
Multi-function collaboration



Security

User Profile Management Authentication; Authorization



Integration

Integration with credit Bureaus and ERP for seamless process



Reports & Dashboards

Executive Dashboards for high level visibility and decision making



Configuration

All attributes tied to an account;
Configurable account hierarchy;
Configurable workflows



Repository

Streamlined & more structured repositories of financial details



BUSINESS VALUE

- Catered to 700+ Force.com Users including Sales, Credit Analysts, Risk Analysts, and Executives
- Delivered cost savings of hundreds of thousands within a year of implementation
- Delivered work process improvement savings by over 5,300 hours in first year
- Integrations with internal systems such as ERP and CRM; and external systems/ credit bureaus such as Experian, Equifax has ensured real-time information access

About Us

Vertex is a CMMi Level-3 IT consulting organization that engages with its customers at a strategic level and provides 'thought leadership'. Vertex's team of Solution Scientists craft innovative solutions, with a holistic view, that make businesses smarter. Vertex acts as an advisory partner, aligning its offerings with the business goals and objectives of its customers.

For more information, reach us at info@vertexcs.com

