

Banking & Financial Services



- Extensive HR capabilities
- Expense control (deferred, conditional, anticipated)
- Leasing and loan management
- Advanced marketing and event management
- Tight multi-year rolling budget control covering procurement of external and internal interdepartmental services
- Internal user service and support
- Extensive data import/export interfacing to other systems, both internal and external
- Active directory support

The banking and financial industries are currently faced with the challenge of working under the pressures of a volatile and changing global economy.

Pressure to improve performance and increase product and service offerings are being compounded with the need to standardize internal applications to enable future growth. With **Priority** you can effectively manage your financial organization to meet these unique challenges, addressing such issues as accounting, meeting increasing demands for regulatory compliance, human resource management, reporting, development activity, project management, campaigns and more.

Priority's end-to-end solution will help you integrate data from many different departments, automate processes, control costs, and respond effectively and efficiently to change. With **Priority** you will be able to deliver better value to your customers, successfully manage your internal resources, and ultimately increase overall performance.



www.eshbel.com

PRIORITY13 WPF[®]

Banking & Financial Services

Eshbel Technologies prides itself on directing its efforts and finding specific solutions to meet the needs of specific industries. In the Banking and Financial industry we have taken real-life scenarios, identified industry specific "issues," and have incorporated solutions to these issues in the software to meet the specific industry need. Following are a few of the issues we have come across in this sector, and the solutions provided in the Priority ERP Software.

Managing Long-term Contracts with Set Payment Dates

Priority contains a unique utility for managing long-term contracts, which have an agreed price and fixed payment schedule. The agreements can be linked to varied exchange rates (in the dual currency package), and are invoiced automatically when a payment date is reached.

In a multi-customer environment, billing can be arranged in advance with the customer via a standing order, and charged to the customer's bank account or credit card.

Multi-Dimensional Analysis of Profit Centers in the Organization

Priority's profit center module enables measurement and analysis of profit centers by up to 5 different dimensions. For example:
Dimension 1 - analysis by activity sector
Dimension 2 - analysis by department
Dimension 3 - analysis by project, etc.
Each dimension can be an independent system of revenue and expense, receiving input directly from financial transactions (or partial transactions). A single financial transaction can take part simultaneously in all 5 dimensions operating in the system according to predetermined rules, when recording the transaction or retroactively.

Working More Efficiently in a Multi-Company Environment

Use **Priority** to define forms as multi-company forms (for relevant users). Users can be authorized to work in more than one company and view all relevant data from this group of companies in a single form. Examples:

- To Do List - Issues awaiting the user's attention are gathered from all companies in which the user is active
- The purchasing manager can view all purchase requisitions from the group in a single form and handle them from the same location.
- The service manager can view all service calls assigned to the group's employees in a single form (in the Customer Service module).

Ensure that Customers are Receiving Dedicated Service from Your Staff

Priority has created an automated module for this very purpose. **Priority's** business process management (BPM) module allows you to define the maximum amount of time that a document can remain in a given status. When the specified time frame has elapsed, you, the manager, will receive a message, so that you can establish the cause of delay and ensure that no one is neglecting your valued customer.



Are your Customers Satisfied with the Quality of Service they Receive from You?

Priority's Customer Service module allows you to perform surveys amongst the customer population. Each survey is accompanied by a structured format of questions and responses determined in advance (which can also be updated during the course of the survey). The survey format is based on multiple-choice questions. The user has free reign over the selection of questions to be included, as well as possible responses. During the survey, each customer contact's responses are recorded.

Data Privileges

Preventing two users with identical form, report and column privileges from accessing data that they are not authorized to view, such as sales data for another branch or salesperson or confidential accounts can be a challenge. The solution to this issue is a data privileges utility that enables you to hide confidential data from users, even if they are authorized to work in the relevant form.

Priority supports data authorization by branch/sales representative, as well as the definition of secured accounts, customers, and vendors.

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Using MS Word Templates to Format Documents in Priority

Priority resolves the common need for customized documents for external use by using MS Word templates. You can design customized document templates in Word, add company logos, and, most importantly, implant "smart tags" for data exported from **Priority** in the appropriate places within the template. Once you have saved the template to the template library, you will be able to print documents in the new format.

For more information and details about our industry specific solutions please visit our website at www.eshbel.com

About Eshbel Technologies

Founded in 1986, Eshbel is a leading Israeli-based ERP company focused on developing, customizing, implementing and supporting ERP solutions. Having accumulated more than 20 years of experience in multiple industries worldwide, servicing over 3000 customers with a combined user base estimated at over 200,000 **Priority** users, Eshbel has achieved worldwide recognition for its strong track record of providing reliable services to businesses in multiple industries worldwide.