

Keesey Consulting, Inc. Custom Application Development

<u>Software Package</u>	<u>Enhancement</u>	<u>Description of Program</u>
Sage Software's ACT!	Quoting System	Keesey Consulting developed an ACT! plug-in that added tabs for proposals and jobs so staff could work from the road using their phones and then synchronize when they got back to the office. This gave the staff all the information needed while on the road making them more productive and it decreased the need for office support
Sage Software's ACT!	Opportunity Re-Assignment	The customer had a long lead time in their quoting process and opportunities would either change owners or territories would change periodically. Rather than change the opportunities one at a time we developed an add-on that allowed them to reassign the opportunity manager/salesmen quickly, easily, and most importantly it was cost effective.
Sage Software's ACT!	PDF Document Merge	The customer worked with an extensive list of vendors that required an array of documents to be filled out when services were provided. To reduce overhead, we developed a PDF merge plug-in for ACT! that would merge the data from the currently selected contact record and fill in the PDF form for them. This change reduced the time consuming function from around 60 minutes to less than 60 seconds.
Sage Software's ACT!	Account Balance Update	In order to have our customer's sales staff know the clients' status when they were working with them, we developed a program to nightly read through their accounting system and update ACT! with the following information: a) Last Year's Sales b) Current Year Sales c) Sales Period To Date d) Last Purchase Date e) Last Purchase Amount This change allowed the owner to avoid costly training and license purchases so his sales team could have crucial information when talking to a customer.
Exact Software's Macola	Automated Customer Statement	The company wanted to send their customers' statements directly to a fax machine or create a PDF of the statement and email it to the customer. These options were not part of the base package but would reduce overhead in the company. To control this process we developed crystal reports and maintenance forms to setup preferences of how the customer was to receive their statement (Printed, Faxed, or Emailed).

Exact Software's Macola	Core Charges for Parts	The customer was having issues with their order entry staff forgetting to enter core charges for items being ordered causing loss of revenue almost every day. We developed a plug-in to their ERP package that upon ordering specific items the core charge would automatically be added to the order as an additional item. This saved time in the order entry process and captured the lost revenue.
Exact Software's Macola	Inventory Bar Code Solution	We have written bar code applications that create labels, capture the scans on pda's, and provide tools for importing inventory counts into Macola for physical and cycle counts. This low cost solution has enabled manufacturing customers to cut their physical inventory counts down from 7 days to 1 day, improve accuracy, and spend more time building product instead of counting inventory.
Harris Data	Dealer and Distributor Web Site	Working with a local marketing firm, we developed an intranet site to allow dealers and distributors access to key features the business wanted to publish to the public. This website allowed the company to control services and to allow easy navigation of 30 plus sub sites all from one menu structure that dynamically changed based on the user login.
Harris Data	Order Import	We developed order import routines for a large distribution company to pull in orders from a parts fulfillment house. These routines eliminated errors caused by manual entry and allowed for a seamless operation to occur between the third party vendor and the company which hired us.
Harris Data	Crystal Reporting Web Site	We developed a data warehouse which updates nightly with the daily activities. The program captured over 8 product lines maintained at 4 business units and allowed the company to run reports against this data. To make things even better, a Crystal Reporting site was developed that, based on login, users could access specific reports needed to perform their daily tasks. This site cut overhead and allowed IT staff to concentrate on other projects besides data exports and report generation for end users.
Harris Data	Positive Pay	We have created automated solutions to work with Citizens Bank's positive pay program. The positive pay program is a program where the bank is notified of each check cut from the company, who the payee is, and the amount of the check. The bank will not cash any check without this information from the company once a company signs up for the program. Due to the time sensitive material with this fantastic feature, KCI wrote automated solutions for 4 business units to generate the data from the check runs every day, creating a file in the bank's specified layout, login to a secure ftp site, and transfer the file daily to allow the bank to cash vendor's checks.