

Customer success story  
WSX Enterprise

Industry

Professional Services 

Not for Profit 

Education and Training 

Location

UK / Ireland

Greentree product suite

Financials

Supply Chain & Distribution

Workflow

eBusiness

Business Intelligence

# THE FAST LANE TO A NEW BUSINESS SYSTEM

Time and money were tight, but WSX and the Greentree partner demonstrated the We<sup>3</sup> spirit to deliver a Greentree implementation in just a few weeks.

To get a new ERP system up and running in the space of a month is quite an achievement – that was the task facing **WSX**, an independent not-for-profit organization delivering services to SMEs across southern England, including start-up training, loans, events, mentoring and support.

“Our sole aim is to help grow the local economy through the services we provide,” explains Financial Controller Samantha Leeds.

Comments in numerous testimonies from clients mentored by WSX include “Great job!”, “Really helpful and knowledgeable”, “Very informative”, “Made me feel positive and motivated” and “Lots of useful, practical advice”.

But WSX had outgrown its existing Epicor system, partly due to changes in the way it handles contracts for development services that are funded by the European Union.

## Smart purchasing, reporting needed

“Financial control is tight, and so real-time data is essential,” Samantha says. “There are also strict procurement guides, which are different depending on the funding source. Therefore we needed a smart purchase order system to capture all the expenditure, with a wide variety of approval alerts at multiple levels.

“In addition, we needed detailed reporting that could be customised to each project, along with the Financial capabilities that could be accessed by multiple users, in the office or at home.”

The Epicor system had been tweaked significantly over the years, which had slowed processes down by imposing complex procedures. There was also a growing need for eBusiness functions, but adding these was going to cost too much. So WSX went shopping for a replacement system.



Samantha Leeds, Financial Controller,  
WSX Enterprise

“We did start the process a little late, but once we had seen the Greentree product we were confident that our timescales could be achieved.”

Greentree and Sage were both asked to demonstrate, and Greentree got the nod over Sage due to its ease of navigation, its reporting capabilities, its ability to connect seamlessly with Excel, and its Purchase Order functionality.

## No time to lose

The Greentree Partner was charged with beginning the implementation in March 2013, but had to have it ready to go live for the new financial year in April. That this was achieved is a tribute to the spirit of We<sup>3</sup> – the unique relationship between Greentree, its partners and its customers.

“We did start the process of reviewing potential systems a little late,” Samantha concedes, “but once we had seen the Greentree product we were confident that our timescales could be achieved.”

WSX’s Systems & Finance Administrator, Julie Pamplin, brought considerable experience in system



management to the table, and was able to create the specialised reports and company templates for the new system. By the start of April, the new system was ready to import the financial data.

With its new Greentree system in place, WSX is already noticing the improvements. Supplier invoices are processed more quickly, and the Excel-linked reporting capabilities have accelerated the claims process.

“Our aim is simple: to help individuals and businesses to grow,” Samantha concludes. “Our Greentree system is already making it easier for us to deliver and report on our creative services that benefit so many local businesses, and the region’s economy.”

Learn more about [Greentree](#)

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**WSX**  
wsxenterprise.co.uk

WSX Enterprise and its associate companies deliver services across London, the SE and SW of England ranging from start-up support through general business advice to specialist support in skills, innovation and sustainability. They have an exemplary track record in delivering publicly funded services to the highest standards of customer service and cost effectiveness. With the support of parent company Southern Enterprise Alliance they are also developing innovative services in their own right and with partners.

[www.wsxenterprise.co.uk](http://www.wsxenterprise.co.uk)

## PARTNERS IN PRIME

Our partners are rare gems with unique, unparalleled skills. Individually and collectively, they’ve earned their stripes transforming thousands of businesses with Greentree software. They have a deep understanding of business needs. The demands are complex, but our partners relish the challenge of making business better. And when you use one Greentree partner, you gain the knowledge of them all. Everyone benefits from tapping into this vast pool of intelligence.

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