GREENTREE 4

MKNAIG THE CMLOPEX SIMPLE

Greentree4 Product Overview

Greentree®
PRIMED FOR BUSINESS

GREENTREE 4

THE ENGINE ROOM OF BUSINESS

Greentree
PRIMED FOR BUSINESS

WHY GREENTREE?

Many software packages come with add-ons, compromises and half-hearted solutions.

Greentree believes you need the reassurance of business software that is both comprehensive and integrated, breaking down barriers and powering you to get on with business.

Responsive and flexible, Greentree provides you with a wide variety of modules and sub-modules rarely found in other packages. You switch on the pieces you need, effectively matching the system to fit your business. As your business evolves, Greentree grows with you.

Exploit its accuracy in business metrics; challenge its capability to deliver insightful information. Greentree eradicates long, complicated tasks and effortlessly manages change, to help grow business potential.

Whatever the need, Greentree gives you choices that are cost-effective and proven. Thousands of companies, large and small, have at their fingertips Greentree's simple, smart thinking that empowers better decisions, better prospects.

And, with a partnership network that spans many countries, Greentree is totally accessible. Your unique needs will drive the way Greentree and its partners respond to you. If the only thing missing from this equation is your business, then get in touch – after all, three heads are better than one.

GET READY TO BE PRIMED FOR BUSINESS.

WE'VE
EARNED
OUR
STRIPES we³

More with the power of three

GREENTREE: OUR EXPERTISE, OUR HERITAGE

Greentree has just one focus: to produce software that helps businesses to think smarter, perform better, and stay ahead of the competition.

"When Greentree started, people said we were crazy. We were told there was enough business software to suit anyone's needs. Thousands of successful installations later, we'd say they were wrong."

Peter Dickinson, CEO – Greentree International

Our story began with CBA, the accounting software that has served businesses faithfully since the 1980s. However, as businesses demanded more and more from their computer systems, we perceived the need for a new product that could handle a multitude of daily business tasks. What's more, all those functions needed to be integrated, so the components could all communicate with each other, and share that vital business data. The result was Greentree: business software that keeps growing, and attracting new customers.

Greentree's story is one of knowledge, skill, and sheer hard work. Each member of our development team has brought with them years of experience in both computing and business organisations. They know what makes good companies tick, and where businesses experience pain.

Our partners likewise have exceptional track records implementing business software. Every customer is different, but our partners have one goal every time: to ensure that the customer gets an affordable system that meets their present and future needs, and solves those pain points.

Greentree has demonstrated its breadth and depth of functionality internationally across a range of industry sectors. We've earned our stripes, but there are plenty more to be earned, and we strive to do that every day. Business and technology never stop advancing, and our substantial investment in research and development ensures that Greentree continues to expand with you.

we³

Greentree is more than its products; it's about the extraordinary collaboration that drives everything we do. Our partners are specialists in technology and business, listening and delivering. Businesses that use Greentree are looking to work smarter and perform better. Their success is our success.

We call this We³.

GREENTREE

We are unashamed technology and business buffs with one obsession: building the best business software. Imagine all your staff having the operational intelligence at their fingertips to perform at their best. Picture how automating many regular processes will free up your talented people to spend more time developing new ideas and making better decisions. Greentree's business software is today's ultimate painkiller and multivitamin.

PARTNERS IN PRIME

Our partners are rare gems with unique, unparalleled skills. Individually and collectively, they've earned their stripes transforming 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 more efficient. When you use one Greentree partner you gain the knowledge of them all - none of our partners operate in a vacuum; there are no walls. Everyone benefits from tapping into this vast pool of intelligence. What does this mean to you? Confidence.

OUR CUSTOMERS

Our customers are smart thinkers, constantly looking for new ways to grow, be more competitive and ultimately, be in total control. Greentree businesses manage large urban and rural properties in the UK; deliver insurance and financial services in the USA; keep workplaces cool in sub-tropical Queensland; sell seafood to New Zealanders and to the world. Whatever they're doing, they want to be the best. They're hungry, obsessed, not limited by convention. And Greentree and our partners understand that drive to succeed.

MORE
WITH THE
POWER
OF THREE ^{we³}

A story the size of Greentree cannot be told in just 58 pages. Visit our website:

www.greentree.com

CONTENTS

GREENTREE4 AN INTRODUCTION

Greentree4 marks the arrival of the next generation of ERP software. It's as much an evolution as it is a revolution with Windows and browser-based access sitting side-by-side. In the next few pages we highlight the exciting new functionality Greentree4 delivers for users of its browser-based software. Then read on to discover the full force of Greentree4's integrated software platform as it continues to innovate and evolve as a business powerhouse.

NEW BROWSER CAPABILITIES

Over the next two pages discover the exciting new capabilities Greentree4 makes available to those accessing its latest browser-based modules. Featuring the very latest in user-based design and touch screen functionality, it brings together everything today's mobile workforce needs to work from anywhere at any time. Initially focused on sales and service delivery, Greentree4 browser functionality will continue to expand right across your organisation.

WORKSPACE

Everyone organises their desks differently because no two people work the same way. Greentree4's Workspace lets you organise your screen to work the way you do. You display the information that's vital to you, in the way you want to view it.

Included	How does it make a difference?
Badges & panels	Instantly know what's happening with coloured badges highlighting key information in real time. Expand to a panel for more detail; prioritise to fit the way you work.
Views Tray	Your top drawer for the panels and badges you always want to keep on hand. Drag & drop any Workspace object into the tray for constant access.
System Menu	Reveals the full range of options available to you within Workspace, including menu search and online help.
Multi-company switcher	No more multiple logins; access all the companies you work for from a single drop-down menu.
The Asterisk	No matter where you're working (or what you're viewing), the Asterisk instantly displays all the available options, actions and information.
A better way to search	Find what you're looking for, using global Enterprise Search directly from Workspace.
Open Leads	Provides quick access to your pipeline, allowing you to prioritise your leads the way you wish.

Greentree4 Workspace badges.

ENTERPRISE SEARCH

Enterprise Search delivers global search engine capability within your own database. No more looking for a needle in haystack - you can search with confidence every time.

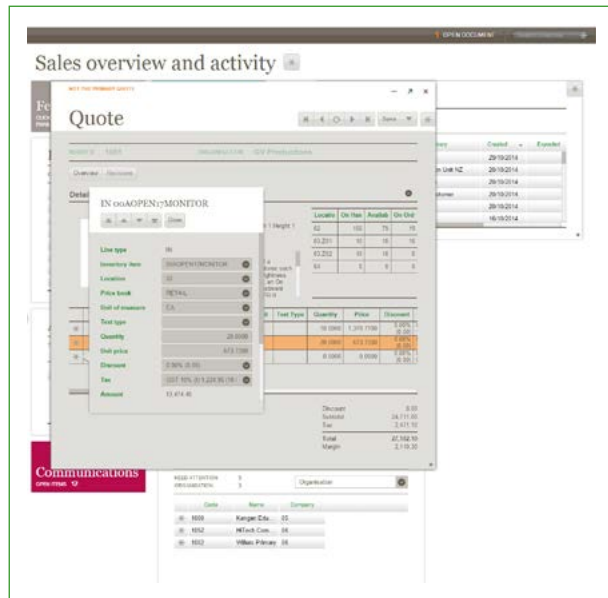| Included	How does it make a difference?
Search everywhere	All it takes is two or three letters or digits to find what you're looking for from any search-enabled field.
Search in context	Results are sorted against a range of configurable criteria – it ensures you get the right answer, faster.
Search index	Expand search parameters to include data that's important or unique to you – if it's in your database, you can search against it.
Search Asterisk	The Asterisk in search fields reveals the available configured options to speed up finding an answer.
Search by what you know	The more you know, the faster the result; search results are continuously refined as you enter more data.
Search in fields	Context-based searching within designated Flexi-Form fields; instantly produces the options you're looking for.
Ever-ready search	Search-enabled fields immediately look for options the second you stop typing; delivering fast, accurate data entry.

Greentree4 Workspace with Sales Quotes panel open

FLEXI-FORMS

Flexi-Forms lets you get information in and out of your business in the most efficient and accurate way possible. It is fast, intuitive and incredibly accurate.

Included	How does it make a difference?
Smart search fields	New smarts to help you find the right info within complete search-enabled fields.
Smart line entry	Instantly check that what you've entered is correct; options automatically display as you enter the data.
Clever grids	Make the most of the visible real estate; consolidates fields and columns based on what you need to see most often.
Pop-up forms	No more scrolling. A small-screen view of the fields available in a line; it's quick, simple and tablet-friendly.
Multiple versions	Use Screen Designer to create new versions of a form to meet the needs of different users, teams or devices.
The Zone	A priority information display area at the top of your screen; it keeps vital information in your face, in real time.
Smart buttons	Click on a Smart Button to see the actions available to you; options change based on where you're working in a screen.
The Asterisk	No matter where you're working, the Asterisk instantly displays all the available options, actions and information.

SCREEN DESIGNER

Screen Designer lets you design your own work processes, terminology and brand into the screens across your organisation – no expert needed.

Included	How does it make a difference?
Change it yourself	Armed with a good understanding of Greentree, create different versions of screens and forms that work the way you do.
Take control	You decide what you see and how you work through a form or process; saves time, improves accuracy and productivity.
Change what you see	A Design Palette offers up all the options available to you depending on the area of screen or form you're working on.
Change your mind	An unlimited ability to "undo" and "redo" the changes you've made.
Call it what you like	Use the terminology you prefer so everyone in your organisation instantly knows what the software is saying.
Put it where you want	Move, manipulate and hide fields, labels, columns and tabs to suit the way you want to work.
Group it your way	Do it yourself. Simplify your workflow: reorder tabs, switch off those you don't need, or create new ones.
Automate efficiency	Reduce the opportunity for error: hide or lock fields that can't be changed and make vital fields mandatory.

Flexi-Forms: Pop-up view showing expanded options for an inventory line item.

GREENTREE4SALES - MOBILE

See how our latest browser capabilities are delivering a game-changing environment for your sales team; at their desk and on the road. See for more information.

GREENTREE4SERVICE-MOBILE

Your field service staff are the next to be empowered by Greentree's browser capabilities. New functionality continues to be rolled out. See for more information.

GREENTREE4TIMESHEETS-MOBILE

Capture time on-the-go, as you work. Designed for use by workers in the field or back at the office. Incredibly intuitive and easy to use, built on the latest browser-based technology for 'work anywhere' connectivity. See for more information.

1 BUSINESS PROCESS MANAGEMENT & WORKFLOW

Processes are at the heart of every business. They dictate the results that are produced, the effectiveness of the staff involved and ultimately the profitability of the business itself. Harnessing these processes to deliver mission critical information to staff at the right time and being able to automate as many of your business processes as possible, is what Greentree does best. We call it 'Operational Intelligence' and it enables you to connect the dots right across the fabric of your business. OI delivers very real ROI to any business and it's the closest thing to a silver bullet your organisation is going to get.

DELIVERING OPERATIONAL INTELLIGENCE

Greentree is unique in its ability to seamlessly connect the dots for you and your staff right across your organisation – no matter what industry you're in. By combining the power of Business Process Management, with Workflow and Approvals & Alerts, you create the opportunity for exponential improvement in productivity, profitability and engagement through developing exceptional Operational Intelligence (OI).

OI delivers the information your staff need, when and where they need it. It captures the IP they now hold in their heads, so you no longer have gaps and cracks appearing. By automating as many processes as possible it frees up your people to do the more interesting aspects of their jobs – making them instantly more engaged and productive. It also reduces the error rate across your organisation and ensures that you can track what is happening, every step of the way.

It's not just your staff that are positively impacted, but your suppliers and customers too. It means fewer balls are dropped on your part and that you can consistently deliver the best possible service to those that matter most – your customers.

Business Process Management (BPM) is a key part of this. So let's take a closer look at what makes BPM one of today's key tools in driving exceptional business performance.

Included	How does it make a difference?
Consistency and Control	Create total transparency every step of the way as clearly defined processes are built into automated steps so all parties are drawn in and communicated with at the right time.
Reduced Risk	Protect your business from the risk of fraud and theft through the many easy built-in auditing controls, from discount monitoring, through to tracking changes in supplier bank account details.
Managed Inconsistency	Remember that not all customers are equal; not every inventory item needs to follow the same process and not every machine or person requires the same kind of monitoring. The right BPM handles these variations, turning exceptions into opportunities to prioritise what's important to the business.

GREENTREE'S BPM

Reach across the organisation

Greentree's BPM works across the entire Greentree product range, making it easy to reach into every area of your business from Purchasing through to Sales, Accounts, HR, Inventory and more, without the need for complex and costly mapping between discrete systems.

Build processes to match your business

We believe that good processes should match your business needs and not the other way around. The flexibility built in to our BPM application reflects this

Unleash the power at your pace

Because businesses of every size benefit from BPM, Greentree's modular solution allows you to gradually unleash the power according to your needs and incremental investment capability.

Optimise the exceptions

Greentree's BPM targets the areas that really matter to you. For example: if you have one customer who represents a significant portion of your business, then it may be appropriate to have processes that are unique to this customer, prioritising their needs.

Make intelligent decisions

Greentree's Workflow displays give you the total role-based visibility you need to start making effective informed decisions by knowing exactly what is happening in your business.

3D Live (Windows)

3D Live adds new depths and layers to Greentree's Workflow active desktop, giving you a fully configurable heads-up display in multiple panels. It doesn't just make information available; it anticipates what you want to see, and colour coding allows you to prioritise it anyway you wish. If you want to see more, the relevant panel expands with a single click.

WORKSPACE

Tailor your screen to deliver information that's important to you in a way that fits how you work. See for more.
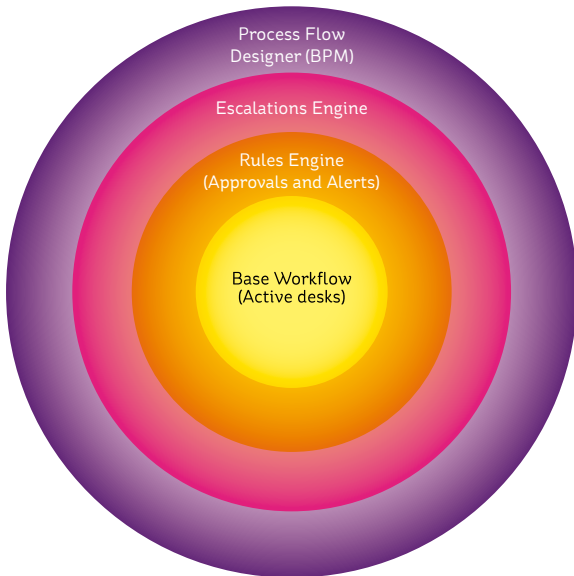
The Greentree BPM Layers

At the core of Greentree's BPM is Active Desks which gives you the visibility you need to make effective decisions. Rules and Escalations allow you to identify and manage events as they come in; both the events expected to happen and those that don't. The Process Flow Designer is a planning system that allows you to graphically build both simple and complex processes.

INFO & DOCUMENT MANAGEMENT

Greentree's Information and Document Management modules create a simple yet comprehensive core to the BPM suite - receiving, recording, storing and retrieving all the necessary documents whether they come from within Greentree or from a non-integrated system.

Included	How does it make a difference?
Attachments and Links	Link any record held in the Greentree database to another, making it easy for users to find relevant information related to the record they are viewing, e.g. supplier invoices and customer orders.
AutoScan	Automatically scan and attach a document to the record resulting in immediate productivity improvements.
Data Import Manager	Automate data file imports from non-integrated systems into Greentree.
Electronic Data Interchange	Utilise a full electronic trading platform that makes it simple to manage in and outbound documents, document mapping, customer and supplier management and exceptions and escalations.
eReporting	Have the flexibility and ease to automatically send reports and business documents such as invoices, purchase orders, remittances and statements to customers or suppliers via mail, email or fax.

ACTIVE WORKFLOW

Take charge with this instant snapshot of real-time key business information live at your fingertips.

Included	How does it make a difference?
Configurable Desktop Views	Highlight precisely the information required for individual or team roles in the organisation with tailored views. Enable users to drill into the information provided for more detail.
Truly Live Data	Have data updated in real-time, vastly reducing the risk of errors or omissions based on outdated information.
3D Live	Anticipates what you want to see, reducing the need to search. Fully configurable display panels, also viewable on multiple monitors.
Workflow Management	Create immediate productivity improvements by empowering managers or supervisors to use Workflow Desktops to monitor and manage the current team workload and to allocate or reallocate work.

APPROVALS & ALERTS

An approval process-management tool that applies to appropriate users and virtually all Greentree records.

Included	How does it make a difference?
System Alerts	Define unlimited rules to trigger alerts from across the Greentree system to automatically notify users of critical information, e.g. when a customer goes over their credit limit. Design alerts based on scheduled or data-driven rules.
Approval Management	Have your approvals processes configured to completely suit your business needs, e.g. for a multi-level approval process, including groups, multiple and sequenced or based on events or exceptions.
Approvals on the Run	With web or mobile-based interfaces make sure approval processes are not held up while staff are out of the office.
Flexible Notification Options	Enable alerts to get through with flexible delivery options including email, pop-up screen notices and SMS.
Fraud Prevention	Ensure your business complies with the internationally accepted compliance standard Sarbanes Oxley, as well as other jurisdictional requirements. Maintain compliance by means of approval rules that make fraud difficult and alerts that highlight potential problem areas.
Initiate New Business Process	Use Alerts to trigger the start of a new business process e.g. purchasing a fixed asset triggers the creation of a fixed asset in the Fixed Asset Register.
Escalations Engine	Use Escalations to monitor by exception e.g. to identify actions that have not been completed on schedule.

eAPPROVALS

As managers and senior staff become increasingly mobile in today's fast-paced world, the need for them to remain hands-on is just as important. eApprovals is the online version of Greentree's Approvals and Alerts module and gives users the information and tools they need to process approvals in real-time from anywhere, to keep your business moving.

BUSINESS PROCESS MANAGEMENT

BPM and the Process Flow Designer bring all the components together into a planning system that empowers you to graphically build both simple and complex processes that manage and support your business and people.

Included	How does it make a difference?
Full Graphical Designer	Develop and configure your own business processes without the need for expensive programming resource.
Self-documenting	Automatically define and document your processes within Greentree, making sure you are compliant with this aspect of standards requirements.
Simple Processes	Simplify routine tasks with one-step task set-ups and point-and-click methodology. Remove damaging human error and unnecessary administration by simplifying and formalising simple tasks.
Complex Processes	Improve your business productivity by defining complex processes including people, data, rules, events, decision 'trees', multi-streaming, prioritisation and escalations from within Greentree.
Track and Audit	At any point in time, track any task to see at what point in the process it has reached. Use the Active-steps facility to show you what tasks have been completed and which tasks are pending. Ensure full auditability by means of total documentation of all events in the process.

SCREEN DESIGNER

Screen Designer does more than any other tool to put the power in your hands. In any of the browser-based Workspaces you can change what's displayed and edit any panel form. See pg 10 for more information.

FLEXI-FORMS

Change the way a form works based on the team it's for, the device it will be displayed on, where and how it will be used with no technical skill required. See pg 10 for more information

Greentree BPM's easy to use, highly graphical process designer.

eDOCS

eDocs slashes the time it takes for you to receive, route, code and approve documents – from invoices to remittances, statements and expenses, you'll be amazed at what you'll save.

Included	How does it make a difference?
Slashes processing time	From inbox to approval in just 18 seconds: eDocs electronically routes documents through your Greentree system for coding and approval.
Faster, more accurate coding	eDocs uses a simple screen to code and approve the document, with the original PDF alongside. You simply tick the appropriate account codes – no data entry needed. Regularly used codes are displayed first.
Paperless approval	Log-in and approve invoices and other documents in seconds; it is easier than signing off with a pen.
Visible status updates	You will know exactly when a document was received, who it was routed to (when) and who it is currently sitting with.
Never pay twice	eDocs checks for duplication not just based on the invoice number but on the date, value and size of the related PDF.
Customer remittances	Allows you to mark which invoices are being paid (or partially paid) on which date. Once payment is made, simply match your receipt to the remittance.
Supplier statements	Reconcile invoices and route payment runs to approvers with the invoice PDFs alongside the eDocs invoice and purchase order approval details.
Expense Manager	Email a photo of your receipts to eDocs then effortlessly code, process and approve expenses.

2 INFORMATION ACCESS & REPORTING

When it comes to information access and reporting, the saying "not one size fits all" is right on the money. We know your business demands detailed information from many varied points of reference. Greentree answers these demands with a wide range of capable tools and an open design to support your information enquiry, reporting and analysis needs.

360° INFORMATION

Greentree's comprehensive Information and Reporting toolsets have been designed with 'extreme' access as a fundamental principle and demonstrate our obsession with total accessibility. This means that Greentree provides pervasive access to your information far beyond the boundaries of traditional solutions.

Included	How does it make a difference?
Workflow with 3D Live	Populate workflow desktops with live information that is highly contextually relevant to the task being performed.
Drill-down and Across	Drill through and traverse information from anywhere in the product by using Greentree's exceptional access to accurate, live information.
User-defined 'Trees'	Analyse information from many different and user-definable dimensions right down to transactional level if appropriate.
Links and Attachments	Easily find relevant information related to the record being viewed, e.g. supplier invoices and customer orders, utilising Greentree's diverse database links and attachments.
Query Tools	Drill, snap and report to flexible output formats with a range of purpose-built query tools.

REPORT DESIGNER

Greentree's Report Designer allows you to create new reports with the advantage of direct access to the data structures within Greentree.

Included	How does it make a difference?
Pre-built Reports	Get started immediately with a library of over 300 pre-built reports.
Powerful Report Designer	Modify or extend pre-built reports or create new reports with the option to group or emphasise new information and tailor the look and feel.
Flexible Outputs	Flexibly manage output to Excel, PDF or email to meet your needs.
Drill Capability	Drill through report content to access underlying data using the 'live' reports.

FINANCIAL REPORTING ENGINE IN EXCEL (F.R.E.E.)

One of Greentree's key advantages is its live integration to Microsoft Excel® which affords a wealth of options to business managers in terms of configuration and presentation of financial reports. (See the Financial Management section pg 28 for more information about F.R.E.E. for Greentree.)

WEBVIEW

WebView opens a dynamic web enquiry and reporting window into Greentree, giving users access to the full range of Greentree information. WebView makes any information that's available in your Greentree system simultaneously available through your browser.

Included	How does it make a difference?
Unlimited Queries	Enquire into, report and review any information through permissions-based, customised forms and reports.
Customer and Supplier Self-service Access	Give customers and suppliers access to information that is relevant to their business relationship with your organisation.
Financial Reports	Publish a range of financial reports to remote management.

REPORTS AND DOCUMENTS

Manage all your financial reports and documents from the one location. Share the information across your team with built in alerts to tell you how many items are awaiting your attention. Never miss an important report, contract, agenda, update or any other record again.

Included	How does it make a difference?
Reports Panel	All of your financial reports held in the one, easy-to-search location. Generate directly from Greentree, share across your team and see at a glance if a new report is awaiting your attention.
Library Panel	Electronically 'shelve' your important non-financial reports and documents in this highly searchable library. Generate from Greentree or upload from other sources. Share across your team and be alerted when new documents have been filed.

GREENTREE SQL

Greentree provides a host of inbuilt reporting and analysis tools plus open access for other reporting systems, e.g. Microsoft® Reporting Services. Greentree SQL offers a number of methods to support open access from ODBC through to populating a data warehouse in Microsoft® SQL Server in real time.

Included	How does it make a difference?
Pre-built Maps	Populate Microsoft® SQL Server using Greentree data maps.
Mapping Wizard	Use Jade's Relational Population Service (RPS) to map Greentree data to a SQL table structure.

GREENTREE API

Easily exchange information between Greentree and other software applications and devices. Greentree's API connection engine enables data to flow both ways, enabling all your applications to effectively 'communicate' with Greentree.

Included	How does it make a difference?
RESTful API	Enables data to flow both ways, creating a seamless, reusable flow of information between Greentree and other sources of data
Existing library	Choose from Greentree's extensive library of pre-engineered APIs or create your own using Greentree's API connection engine.
Reduces configuration required	Some configuration may be required but with Greentree API the connection engine does most of the work for you.

ENTERPRISE SEARCH

Browser empowered users get accurate, relevant searches results every time with Enterprise Search - your very own global search engine, within your own database. See pg 9 for more.
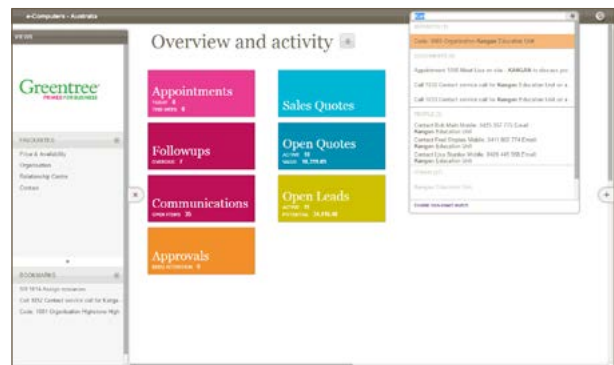
3 BUSINESS INTELLIGENCE
GREENTREE IQ (POWERED BY QLIKVIEW)

What don't you know about your business? Fire up Greentree IQ* to see your business in a whole new light. It's graphical, it works the way your mind works, it's fast, it is so easy to use, it's even fun!

Greentree IQ* is not reporting: it's the next generation of interactive business intelligence that really puts you in charge! Greentree IQ*, powered by world-leading business intelligence software QlikView, builds a total view of the company including the ability to compare customer, product line and territory performance, identify trends and build forecasts based on 'what-if' scenarios and perform detailed critical analysis of key business indicators.

In just seconds, take your data and see it any way you want. Put it in sexy charts, tables, graphs – every kind imaginable. Make them 2-D or 3-D, zoom in, zoom out. Click anywhere for more detail.

With Greentree IQ* you will get the information you need in seconds so that you can focus on what is important – making decisions and taking care of business.

Included	How does it make a difference?
Pre-built Models	Rapid deployment becomes a reality by using Greentree IQ* pre-built set of business models.
Tailored Applications	Tailor the pre-built models or create your own to meet your precise business intelligence needs.
Dashboard and Scorecard Visual Presentation	Use the fully customisable dashboard and scorecard interface design to drill right down to transaction level.
Speed and Ease of Use	Achieve in seconds what used to take days with lightning-fast dynamic architecture. The intuitive interface is easy for any user to understand and use freeing you up to focus on the business issues, armed with better information.

* Powered by
QlikView

Where you can see at a glance performance of the company by use of Key Performance Indicators.
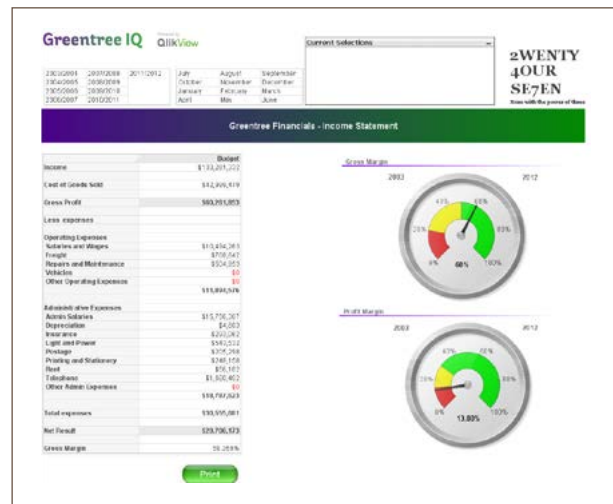
To be able to view your profit or loss using different dimensions to filter your data and see where your most profit or loss is generated.
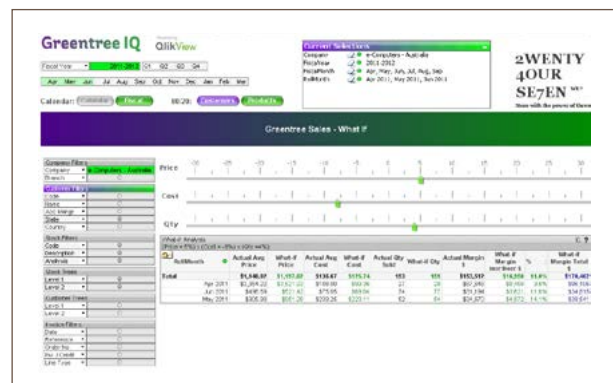
Used to create What-If scenarios. You can move Price, Cost or Quantity up or down and use Filters to see how your sales would be affected by different scenarios.

4 eBUSINESS

Greentree's eBusiness suite provides a flexible web solution designed to give customers, suppliers and staff the control and instantaneous levels of service and information access they expect. Not only that, but because you're removing all the redundant human elements from the equation, you can expect to dramatically decrease your costs. The eBusiness suite will also help eradicate mistakes that have a high business cost and can damage your business relationships.

Empower your customers to get what they want, at the time they want it. Allow them to see for themselves how your pricing and specifications measure up. Make it easy for them to place their order with no hassle, no queues, voicemail or human error. They're in control; and they're choosing to do business with you because of it.

It's not just customers who enjoy being in the driving seat. Suppliers can streamline your business processes when they can reach into your systems and monitor inventory levels for you, initiating requisitions, dealing with delivery problems or making payment enquiries for themselves.

Staff that are in control of their own HR records, leave applications and can see approval requests getting processed faster than ever are more motivated and committed to your success.

OVERVIEW

Included	How does it make a difference?
WebStore	Effortlessly add a whole new distribution channel. Enable customers to browse illustrated product catalogues, check pricing and availability and enter orders - all fully integrated with your Greentree system. *See the Supply Chain and Distribution section pg 36 for more information.
eService	Empower customers, resellers and staff to self-manage service delivery from start to finish. *See the Customer Relationship Management section pg 48 for more information.
eHR	Give staff the tools to manage their own HR records and leave requests *See the Human Resources section pg 32 for more information.
Greentree4Timesheets-Mobile	Accurately record time in the field or office; fully configurable and exceptionally easy to use with in-built reminders and summary or detailed view of time captured. *See the Job Cost section pg 40 for more information.
eRequisitions	Enable any authorised user to take control of their own requisition and inventory needs. *See the Supply Chain and Distribution section pg 36 for more information.
eApprovals	Streamline the management of multiple locations and remote workers by giving staff the information and tools they need to process approvals from anywhere in real-time. *See the Business Process Management and Workflow section pg 12 for more information.

eReporting	Enjoy the confidence that comes with knowing your business documents such as invoices, purchase orders, remittances and statements are delivered via the appropriate electronic delivery method. *See the Financials section pg 28 for more information.
WebView	Empower your team and business partners with full web access to all the information available in Greentree. *See the Information Access and Reporting section pg 16 for more information.
eDocs	Slash the time it takes for you to receive, route code and approve documents - no double entry required. *See the BPM and Workflow section pg 12 for more information.
EDI	Elevate your business with electronic trading that brings you, your customers and suppliers closer than ever, resulting in fewer errors and billing and payment delays, and overall improved service levels. *See the Supply Chain and Distribution section pg 36 for more information.
Greentree4Sales-Mobile	Connect your field sales staff directly into your business engine with anytime, anywhere browser access. * See the Mobile Solutions section pg 24 for more information.
Greentree4Service-Mobile	Connect your field service staff directly into your core business system with anytime, anywhere browser access. *See the Mobile Solutions section pg 24 for more information.

5 MOBILE SOLUTIONS

In today's increasingly competitive and fast-paced marketplace customers demand rapid, accurate service together with reduced costs. When your business is already running lean and delivering quality results, what can you do to further increase productivity and service levels and even reduce costs?

If you have sales or service staff in the field, or operate a warehouse, you can: improve staff efficiency, totally eliminate administrative functions, reduce data errors by up to 100% and increase customer satisfaction dramatically. All these simply by introducing mobile business applications. Industry studies have shown over 400% return on investment (ROI) by businesses using mobile solutions.[†]

Greentree4 has broken the mould to unleash the power of your enterprise system and liberate your mobile workforce. The complex really has been made simple with the delivery of remote working capability to both Windows-based and browser-based mobile modules.

The new browser-based mobile modules are continuously evolving with sales staff the first to benefit, with Greentree4Sales-Mobile seamlessly connecting the sales engine to your business engine. Greentree4Service is the next to be progressively rolled out to deliver the same high level of connectivity with a purpose-built user interface to field service staff.

GREENTREE4SALES-MOBILE

The first of our browser-based mobile solutions, Greentree4Sales-Mobile is perfect for your on-the-road sales team. Access the functionality you need for sales success in the field with individually customisable, highly-intuitive screens.

Included	How does it make a difference?
Workspace for Sales	Designed for salespeople; key data is always in view with the ability to configure what's on screen to fit the way you work.
Organisations	Everything you need to know about customers, suppliers, resellers or prospects.
Contacts	Displays all your contact information – customers, suppliers or prospects – with Activity tab for more details & Google Maps.
Relationship Centre	All activities for organisations are available in one place – historical and upcoming.
Quote Form	Quoting's never been faster, easier or more accurate. Live prompts with pre-populated fields.
Price & Availability	Accurate product pricing with automatically calculated discounts, plus real-time availability with smart substitutions and possible add-ons.
Leads and opportunities	Displays a great overview of all your live leads, highlighting the next actions required.
Sales View	An up-to-the-minute snapshot of your organisation's end-to-end sales process.
Sales Orders	Instantly create a sales order on the spot and get sign-off.
Sales Pipeline	A graphical view of your sales leads that can be weighted based on probability of closure, with detailed drill-down to each lead. Update in real time to accurately track leads and forecast revenue.

GREENTREE4SERVICE-MOBILE

The latest of our next-generation browser-based capabilities, with extended Greentree4Service functionality to be continuously rolled out. Greeentree4Service-Mobile transforms the way your field service staff work with highly intuitive software design that connects them directly to your core Greentree business systems. Work faster, smarter and deliver a better customer service experience than ever before.

| Included	How does it make a difference?
Workspace for Service	Your field service staff will always have the information they need, right where they need it – displayed in a way that makes sense to them.
Organisations	Everything your service team needs to know about their customers and suppliers in one easy to search location.
Contacts	Comprehensively capturing all of your contact information, including an Activity tab to track more details and Google Maps embedded to make every contact easy to find.
Relationship Centre	All of the activities related to customer and supplier organisations brought together in one place – historical and upcoming.
Service Calls and Requests	Manage your work day from one easy-to-use panel. Identify and prioritise work that is yet to be allocated then track each job as it is completed and seamlessly move to invoicing.
Assets	See the equipment your customer owns and its service history as recorded in your system. Records are automatically updated as work is completed.
Timeline	Know the key times and dates for any service work based on your agreed SLA's or regulatory requirements. Using the Approvals and Alerts engine, build escalations based on those deadlines.

Dedicated Greentree4Service-Mobile Workspace

GREENTREE4TIMESHEETS-MOBILE

Capture time on-the-go, as you work. Designed for use by workers in the field or back at the office. Incredibly intuitive and easy to use, built on the latest browser-based technology for 'work anywhere' connectivity. You get to configure the fields to work the way you do, with in-built reminders so you're never late. Timesheets-Mobile not only revolutionises how you capture time but how you bill for it as well.

See the Job Cost section pg 40 for more information.
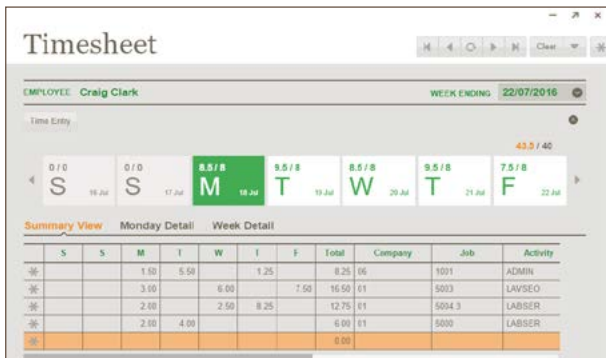
MOBILE WAREHOUSE OPERATIONS

How can you increase productivity, reduce costs, improve process efficiency and increase revenue without major effort or staff upheaval?

Greentree's Windows-based Mobile Warehouse Operations suite[‡] can provide the platform for your business to take it to the next level.

Included	How does it make a difference?
Inventory Management	Perform full or partial inventory counts and variance management. Check availability of any item at any location at any time. Transfer items between locations and bins to make inventory adjustments easy.
Picking	Ensure the right item is picked and packed every time using integrated barcode scanning. Enable orders to be quickly picked with mobile picking plans by location, bin or sales order. Allow for variations and changes encountered on the floor to be captured and dealt with at the time of discovery.
Receiving	Scan incoming inventory and instantly record variances and damaged goods for quick rectification. Guide warehouse staff with designated put-away locations.
Despatch	Print packing slips, capture freight, packaging and consignment information. Use Alerts for Email or SMS customer notifications.
User Interface	Use the purpose-built mobile interface to provide intuitive navigation and minimal keystrokes.
Integration to Greentree	Ensure absolute consistency of familiar terminology and business rules by leveraging Greentree's rich functionality.
Simple Deployment and Update Management	Receive automatic updates when a mobile device connects, as Greentree Mobile detects that software updates are available.
Connection Options	Operate on wireless, mobile broadband or Wi-Fi hotspot as Greentree Mobile is independent of the network carrier.
Data Filtering	Filter customers, service activity, inventory and all the information relevant to that user.
Approvals and Alerts	Make use of the full power of Approvals and Alerts delivered to the mobile.
Scanning	Speed up input and eliminate errors by using the built-in device scanners.
Signature Capture	Capture signatures to complete field documentation.

[†] Mobility in Today's Service Organisation, Aberdeen Group: Business Benefits of Industry Specific Mobile Applications, IDC.

[‡] Uses the latest Microsoft Windows Mobile Platform.

6 FINANCIAL MANAGEMENT

Effective business management has at its core proficient financial management. It's vital to have the right tools to give you accurate, instant, reliable and error-free information to maximise the control you have over your business performance and results.

Right at the heart of Greentree is a robust, secure financial management suite designed to provide a full range of essential management and accounting functions together with the facility to easily create sophisticated financial views and reports.

MANAGING FINANCIAL ENTITIES

With Greentree's Financial Management suite you have the tools to establish accounting structures irrespective of the complexity of your geographic or management configuration.

Included	How does it make a difference?
Inter-company Accounting	Make sure your ledgers are always in balance, supported by full multi-company capabilities, with each company able to operate in a different base currency, accounting period and year-end if required.
Quad Accounting/ Logical Companies	Use Quad Accounting if your organisation is made up of a number of smaller entities that don't require the set up of a full company but have separate reporting requirements, e.g. trusts and franchises.
Consolidations	Prepare consolidated financial statements that are fully compliant. Greentree's Consolidations module enables organisations consisting of several different companies that are controlled by one central company to understand and comply with international accounting standards.
Translations	Produce the reporting of the company balance sheet, profit and loss or complete ledger in multiple currencies.
Multi-Currency Facilities	Utilise full multi-currency capabilities designed to cater for international trading. As businesses become global and traditional boundaries disappear, the systems used need to reflect this in all areas.

GENERAL LEDGER

Greentree's General Ledger module has all of the accounting features you expect from a leading software package.

Included	How does it make a difference?
Flexible, Validated Accounting Structure	Define and generate the chart of accounts to suit your business structure e.g. around divisions, territories and lines of business ensuring best fit.
Dynamic Structures and Transaction Analysis	Enable different 'views' of your financial information (at account or transaction levels) without introducing unnecessary complexity in the account structures, such as geographical, statistical and management structures, so you get the information that's most meaningful to your management team.
Budget Management	Minimise administration with easy creation and tracking of multiple budgets.
Seamless, Secure Period-end Closing	Save time and complexity with easy management of year-end adjustments with postings into future or prior periods. Reprint reports after adjustments have been made in prior periods so you don't need to be locked down until you're ready.
Journal Management	Manage recurring or standing journals by means of comprehensive, flexible journal management. Easily post journals directly and automatically from external systems such as payroll and Microsoft Excel.® Create inter-company journals easily, at any level.
Cost or Revenue Allocations	Save time and increase financial reporting accuracy with automatic spreading of costs or revenue via allocation rules.

ADVANCED SECURITY

Greentree's Advanced Security module applies to the entire Financial Management suite. It provides user-based rules to govern precisely which accounts (financial, customer, bank, supplier) each user can access and post to, meaning your data is secure.

FINANCIAL REPORTING ENGINE IN MICROSOFT EXCEL® (F.R.E.E.)

One of Greentree's key advantages is its live integration to Microsoft Office Excel®. Financial management reporting in Greentree is provided through Excel, affording a wealth of options to financial professionals in terms of configuration and presentation of business reports.

Included	How does it make a difference?
Live Links to Microsoft Excel®	Develop dynamic, up-to-the minute financial reports in Microsoft Excel® with ease, built with live data drawn directly from your Greentree operational system.
Drill Down to Core Data	Have confidence in the accuracy of your financial information by using the unique drill down to General Ledger option from within Microsoft Excel®.
User-defined 'Trees'	Analyse information from many different and user-definable dimensions right down to transactional level if appropriate.
Flexible Budgeting Tools Using Live Links	Leverage the flexible modelling power of Microsoft Excel® to develop new budget versions and update directly back to Greentree.
Beyond Financial Reporting Capabilities	Use F.R.E.E. to post transactions, upload and modify master files and even connect legacy systems that can't integrate directly with Greentree.
Data Security	Apply all of Greentree's validation, security and business rules, even though you are in Microsoft Excel®.

CASH MANAGEMENT

Managing bank balances is a critical process for any organisation and with Greentree's real-time integration between its modules, the bank balance reflects all transactions in real-time.

Included	How does it make a difference?
Bank Account Management	Obtain an accurate cash position at any point in time with balances reflecting instantaneous updates by transactions as they occur within other Greentree modules. Multiple bank accounts in both local and foreign currencies. are supported
Cash Analysis and Budgeting	Maintain control over cash expenditure with the easy analysis and grouping of transactions. Review budget versus actual variances relating to all or specific user-definable analysis codes at any time.
Reconciliations	Avoid unnecessary rekeying with bulk auto-bank uploads. Save time and avoid errors with quick and easy bank reconciliations.
One-off Payments and Receipts	Handle one-off payments and receipts without setting up unique supplier or customer records.

ACCOUNTS RECEIVABLE

Nowhere in your business system is it more important to have complete, accurate and real-time information than in Accounts Receivable. Greentree exceeds all expectations in this area, with flexible debtor management which can be enhanced with integrated eReporting, EDI and customer self-service through eCRM; all of which tighten your control of debt and increase your rate of collection.

Included	How does it make a difference?
Customer-specific Trading Relationships	Create customer-specific trading relationship rules to increase the rate of prompt payments and keep your collection costs to a minimum.
Visibility and Tracking	Maintain control of your debtor relationships by having total visibility and tracking right down to individual sales levels.
Recurring Invoices	Slash administration overheads with the recurring invoice function used for regular invoices e.g. rents and leasing.
Direct Debit	Easily identify when payments are made by direct debit with matching tools.
Early Payment Discounts or Automatic Overdue Penalties	Use targeted discounting to encourage early payments. Eliminate late payment with the automatic calculation and billing of overdue penalties that can be set according to customer-specific rules.
Parent/Child Structures	Expertly manage trading with large, multi-location organisations. Speed up collection efforts by dealing with the right collection entity first time.
Refund Management	Easily manage the refunds process through to payment, minimising administration and keeping in line with customer-specific rules for credits or refund payments.
Credit Cards	Readily cater for customers who need the flexibility of select credit card as their chosen payment method. Managing the instant, risk-free and secure collection, receipting and auditing processes is a breeze.
Proactive Debt Collection	Use Greentree's Debt Collection module with targeted call lists, payment commitment tracking and follow-up actions tools to drive successful debt collection.
Sales and Receipts Analysis	Identify payment trends and build an accurate picture of your sales effectiveness.

ACCOUNTS PAYABLE

Control and monitor where your money is going and you can better control your business' future. The Accounts Payable module provides a managerial accounting tool that presents a clear picture of what is owed to suppliers and what your future cash commitments are. It can be enhanced by integration with Greentree's EDI, Purchase Orders and eReporting modules.

Included	How does it make a difference?
Supplier Trading Relationships	Manage your future cash commitments by setting up your supplier trading relationships accurately. Avoid costly late-payment penalties. Ensure tax compliance by making certain that your systems fully recognise the implications of doing business with each supplier e.g. Withholding Tax.
Document Capture (AutoScan*)	Minimise administration and approval delays with the document AutoScan feature, providing instant access to source invoices.
Invoice Management	Eradicate errors by instant matching of invoices to purchase orders. Effortlessly manage recurring invoices and queue for approval and payment. Easily capture and report all costs for expense management purposes.
Approvals*	Avoid fraud and errors with the accurate, user-defined approvals system.
Payment Processing	Take the complexity out of who to pay, when and how much.
Payment Options	Streamline defined payment options by supplier including manual and bulk payments, cheque, direct credit or interfacing with banks. Flexibly handle casual suppliers who need payments outside the usual payment runs.

eDOCS

From inbox to approval in just 18 seconds; eDocs slashes the time and cost of getting invoices, customer remittances, supplier statements etc through your system. See pg 15 for more.

REPORTS AND DOCUMENTS

Imagine having a complete, highly searchable library of all the reports and documents assigned to you. That's what Reports and Documents brings to your screen; you always have the most recent version available to you, are alerted to any changes made or actions assigned to you. A full, auditable, history is recorded against each document with the power to discuss changes across the group of users' assigned access to it. See pg 18 for more information.

FIXED ASSETS

Managing fixed assets, maximising depreciation and planning for future capital investments or disposals is made easy with Greentree's Fixed Assets module.

Included	How does it make a difference?
Fixed Asset Management	Save time and administration costs in managing a large number of assets using the flexible asset grouping structure. Use serial numbers to easily keep track of assets and their location across the business.
Fully Integrated Operation	Streamline asset purchasing and remove double handling as you raise a purchase order and post payables directly to the asset ledger. Automatically post depreciation across jobs and projects to ensure accuracy of costs.
Valuation Management	Better manage your Fixed Asset Register using the flexibility of advanced features to allow for revaluations, differential depreciation between tax and accounting and automatic calculation of profit or loss on disposal of assets.
Forecasting Facility	Plan for the movement of assets in and out of your business. Easily monitor and incorporate changing conditions as they arise. Use 'what-if' scenarios to plan for the impact of depreciation.

eREPORTING

Every business looks for ways to save valuable time spent on repetitive, yet essential, administration tasks. Greentree's eReporting module provides the flexibility and ease to automatically send reports and business documents such as invoices, purchase orders, remittances and statements to customers or suppliers via email or fax.

Included	How does it make a difference?
Delivery Methods	Ensure automatic delivery using contact email or fax settings for each customer and supplier, by document type. Easily set email and fax preferences as well as fax cover sheets for all reports. Print selectively for customers and suppliers that request traditional mail while automatically producing emails and faxes for everyone else.
Tailored Document Layouts	Be confident that each and every document sent through the Greentree system matches your predefined formatting for each document type.
Automatic Remittances	Significantly slash the costs associated with handling remittance advices as these can now be automatically transmitted according to predefined supplier settings.

7 HUMAN RESOURCE & PAYROLL

People form the true value of most businesses. The effective and comprehensive management of their competencies, knowledge and personal attributes can be complex and result in high administrative overheads. Mistakes or oversights can result in reduced productivity, less than optimal staff/management relationships or missed opportunities to enhance the effectiveness of existing talent. Businesses can find themselves also falling foul of employment legislation or with crippling retention issues and loss of skills.

Greentree's Human Resources (HR) suite offers a full set of tools to manage personnel throughout the business: from payroll, to leave planning, employee development and occupational health and safety through to recruitment and all the analysis and reporting tools needed to effectively monitor the capabilities and allocation of human resources.

PAYROLL

Running an efficient and prompt payroll is critical for any organisation, as the flow-on effects of payroll errors can be crippling for both staff and management. Greentree's Payroll module delivers both reliability and a fully streamlined payroll process.

Included	How does it make a difference?
Payroll Processing	Automatically calculate pays from the contract, templates and transaction types defined for each individual.
	Easily handle and process manual payments and adjustments.
Management and Statutory Reporting	Provide all the necessary analysis and insight required by most organisations using an extensive library of reports which can be tailor-made for your needs.
	Manage tax and superannuation reporting with ready-to-use templates.
Leave Processing	Easily manage and report on all forms of accrued leave by setting user-definable rules for each type of leave.
	Define rules for leave at a global, contract, group or individual level, to meet your business requirements.
	Produce full statements of leave to ensure staff and management can verify the entire leave history at any point.
Employee Record Management	Use templates to quickly and simply manage employee records.
	Attach documentation such as résumés or sick-leave certificates, so the complete picture is always available.
Function and Data Security	Protect your sensitive data with this powerful and highly flexible security structure.
	Set access rights not only to functions but also right down to individual employee data.
UK Auto Enrolment	Fully compliant with the UK Government's requirements for auto enrolment into pension schemes.

* Please check if Greentree Payroll is certified for your country.

HR MANAGEMENT

Effective management of human resources begins with accurate and detailed records of attributes and capabilities. Greentree's HR Management suite provides the tools to create a human resource information system that forms the basis of your organisation's workforce planning and analysis.

Included	How does it make a difference?
People Management	Create standard job functions to be allocated to employees so you can ensure that staff are suitably qualified and equipped.
	Store résumé and curriculum vitae records either as database items or attachments to capture the full picture.
	Readily perform powerful skills searches on the employee database based on résumé details to maximise your organisation's existing skill base.
	Attach files of any format to an employee record, e.g. driving licence copies, qualification certificates or incident reports, for easy retrieval when needed.
	Link employees to other employees or external contacts for quick information retrieval for projects or specific events.
Organisation Charts	Create detailed organisational charts to visibly show the relationship between roles and functions.

RECRUITMENT

Greentree's Recruitment module manages the process of attracting, assessing and recruiting the best talent available.

Included	How does it make a difference?
Positions and Definitions	Clearly define specific roles within your business, including the functions that must be performed, job description, certifications and other requirements.
Applicant Management	Store all applicant data such as résumés, employment history, education, skills and experience and supporting documentation.
	Easily scan for skill matches, both within existing staff and new applicants, using the powerful search engine provided.
Recruitment Processing	Define an unlimited number of stages to make up the recruitment process to best fit with the requirements of the role to be filled.
	Ensure recruitment complies with your procedures through established processes.
	Provide important cross-referencing and checking to ensure compliance by means of an in-depth audit trail.
	Streamline communications and reduce administrative overheads with automated mail merge and bulk email tools.
Billing and Finance	Manage associated expenses such as internal HR overheads, recruitment advertising or agency fees so that costs are correctly tracked and allocated.

EMPLOYEE DEVELOPMENT

Greentree's Employee Development module automates the management process for staff reviews and maintains vital information on staff training, success and remuneration to assist your organisation with the development of your people talent.

Included	How does it make a difference?
Staff Reviews	Give staff and management confidence in the review process by automatic scheduling of regular reviews.
	Allow for easy access to relevant information such as Key Performance Indicators and previous reviews.
	Make use of improved processes around staff reviews to increase job satisfaction which can translate to better retention rates.

LEAVE PLANNING

Streamline your organisation's leave-planning procedures and minimise the time and resource demands on HR and management staff with Greentree's Leave Planning module.

Included	How does it make a difference?
Leave Requests and Approvals	Enable staff to view and request leave by date, type and reason.
	Empower managers to review, approve or reject leave requests with full access to all details and entitlements.
	Document and communicate approvals (and rejections) by email in real-time to ensure clarity.
Leave Reporting	Tailor the built-in reporting capabilities to ensure the exact information needs of the organisation can be met.
High Visibility Planning Boards	Real-time information on all activities is displayed. Tasks can be allocated or re-allocated, and even actions in the field can be monitored via input from mobile devices.
Forecasting	Enable managers to forecast what leave their staff will accrue up to any date in the future.

HEALTH & SAFETY

The benefits of maintaining a safe work environment are considerable for any organisation: from preventing potential injuries, to cost and efficiency improvements and compliance with statutory requirements. Using Greentree's Occupational Health and Safety module can help to ensure that when incidents do occur they are properly managed.

Included	How does it make a difference?
Incident Management and Reporting	Input and store all necessary workplace incident information to ensure complete records.
	Easily tailor reports to view single or multiple incidents for analysis.
	Attach documents and files in any format so that all details are stored in the one easy-to-access location.
Follow-up	Automatically trigger follow-up actions for correct process compliance.
External People Tracking	Keep track of the external people involved e.g. witnesses, medical staff and industrial or government staff.
Rehabilitation and Return-to-Work Management	Track and record post-incident outcomes including rehabilitation and return-to-work plans.
Process Definition	Use Greentree's Workflow module to define and audit processes that ensure compliance.

eHR

Let's face it, your staff book their holidays on the web, so why not let them check and request leave via the Internet as well. With Greentree's eHR web kiosk they can access and maintain leave and personal records.

Included	How does it make a difference?
Personal Data Management	Provide the facility for employees to maintain their own information including address, banking, contact and emergency details.
Leave Summaries	Easily access a one-stop summary of leave balance and history.
	Allow staff to submit leave requests from anywhere and to receive an immediate email advising them of approval or otherwise.
Management Approvals	Enable all leave requests to be viewed and approved or rejected without the manager or staff member having to be in the office.

Greentree
PRIMED FOR BUSINESS

GREENTREE 4
EXPANDS
WITH
YOU

8 SUPPLY CHAIN & DISTRIBUTION

Driving sales by exceeding customer expectations is what great supply chain and distribution management systems are all about.

Greentree's Supply Chain and Distribution suite delivers on the challenge of pressured sales and delivery where customers just won't wait. Your sales, purchasing and logistics teams will thrive with the best tools available and boost confidence in your supply process, from customer request through to delivery.

INVENTORY

You don't need a crystal ball when using Greentree's Inventory Management. Achieve a competitive edge and keep a tight control on lead times and inventory costs with pin-point accurate inventory requirement forecasts. Making sure your salespeople can commit to deliver will excite your customers and seriously raise the bar compared to your competition.

Included	How does it make a difference?
Extensive Inventory Management	Track unlimited inventory information including serial, lot and dimension tracking, transaction analysis, kitsets, item 'supercessions', warranties, weights, volume, companion items as well as user defined fields.
	Make accurate product reorder decisions armed with full demand history and forecasts.
	Sell to any market or customer currency requirement.
	Boost your pricing competitiveness with accurate landed inventory costs.
	Trace items by serial or lot number, use-by date or even when superseded or obsolete.
	Reward customers with pricing unique to them.
	Clearly identify items with system-produced receiving and retail labels.
Effective Warehouse Management	Live updates from throughout Greentree mean precise inventory quantities by location and warehouse right down to serial/lot/dimension level if required.
	Eliminate picking or put-away errors and boost productivity using mobile handhelds and barcodes.
	Maximise warehouse space utilisation and optimise multi bin management with automated picking and put-away advice.
	Always have goods on hand, with Greentree's automated replenishment processes.
	Keep the doors open and trade right through an inventory count process.

SALES AND DELIVERY

This is where the rubber hits the road; so, making sure your staff have the information they need, when they need it, is critical and you can count on Greentree's Sales suite to deliver for you.

Included	How does it make a difference?
Sales Management	Empower frontline sales staff with instant access to customer-specific pricing by currency, item and quantity.
	Offer alternative or complementary items, source from another location, back-order and give realistic time frames for delivery.
	Prompt customers to increase orders by providing visibility of their previous purchase history.
	Save customers' time and speed up sales processing with one-click prior-order activation.
	Proactively manage sales for customers with overdue balances, to avoid over-extending their accounts.
	Capture sales directly from customers in the field with mobile sales entry.
	Skyrocket sales, see absolutely everything you need to know, when you need to know it, with Greentree's 3D Live dynamic desktops.
Streamline Delivery	Link back-ordered items directly to purchases and drop-ship to customers.
	Fully inform your customers with the exact status of every item in their order at any time.
	Ramp up the efficiency of deliveries with co-ordinated delivery 'run/drop' sequences.

GREENTREE4SALES-MOBILE

Directly link your sales team to inventory: Real-time availability and ordering. See for more information.

PURCHASING

Sales and Delivery excellence is only as good as your ability to supply when you need to and at the right price. Greentree's Purchasing suite cracks the whip on supplier relationships to make sure you can deliver on time, every time.

Included	How does it make a difference?
Purchase Management	Carve costs with supplier-specific purchasing agreements.
	Inventory will always reach the right customer with purchases linked directly to sales and jobs.
	Rapidly fill outstanding customer orders with automatic back order release on receipt.
	Slash administration for placing and processing regular standing orders.
Cost Variance	Achieve tight control of cost variances between expected and actual costs.
	You choose how these variances are handled, either by absorption, isolation or further investigation.
Reorder Management	Get the goods on time every time with automatically suggested reorder quantities.

SUPPLY CHAIN

Greentree's Supply Chain suite assures precision execution of the supply process, from request through to delivery.

Included	How does it make a difference?
Requisition Management	Tightly manage purchasing and control spending while boosting your purchasing leverage with suppliers.
	Sharpen the pencil, consolidate orders across branches to meet minimum order quantities, boost volume discounts and slash freight costs.
	Speed up approvals with single and multi-layered approvals processes.
Inventory Sourcing	Optimise supply with automatic analysis of requisitions to suggest the optimal supply option and speed fulfilment with automatic purchase order creation or transfer from an alternative location.
Catalogues	Provide complete visibility of unlimited supplier catalogues without holding the stock as physical inventory, making it easy to order one-off items.
Sales Analytics	Focus on specific sales analysis breakdowns using an extensive range of criteria and filters to pinpoint issues and trends.

QUALITY CONTROL

Sending customers faulty products drives a wedge into your relationships. You can offer customers a hand-on-heart guarantee that this will never happen with Greentree's Quality Control suite.

Included	How does it make a difference?
User-defined Configuration	Set up your own comprehensive quality checks with approvals for added safety.
Track and Traceability	Precisely track products to customer by serial number, batch number or even who performed the quality check to ensure full visibility.
Compliance with Standards	Build in your own standards for test classifications to be absolutely certain faulty goods are never released.

For more details on the Quality Control module please see our Manufacturing suite .

MATERIALS REQUIREMENTS PLANNING

Greentree's Materials Requirements Planning (MRP) draws on key business activities to make sure goods are ordered when they are needed to satisfy customers.

Included	How does it make a difference?
Requirements Planning	Determine exactly what and when inventory items are required, where they are to be sourced from and where they are needed, to deliver on time and with the sharpest prices.

For more details on the MRP module please see our Manufacturing suite .

WEBSTORE

Easily create a new distribution channel for your business. Greentree's WebStore system makes it simple to sell securely on the web.

Included	How does it make a difference?
Full Integration with Greentree	Web-generated orders are processed immediately with the Greentree system so customers know their orders can be fulfilled and you have the full sales picture right away. The power of Greentree's Inventory software gives you the flexibility you need with your store front, e.g. product images, multi-component kits, quantity price breaks and more. Inventory pricing changes and on-hand balances are immediately reflected on your WebStore.
Ease of Use for Customers	Empower customers to maintain their own details and view past orders and account history. Regular customers can create their own catalogues of favourite products. Rapidly locate inventory items in even the largest catalogues with powerful search tools.
Content Management	It's as live as you can get, with all product information maintained dynamically through your Greentree system. A comprehensive library of WebStore page templates, style sheets and JavaScript's is provided and can be tailored to create your own WebStore look and feel.

EDI

There is a growing trend amongst smart customers and suppliers to require business partners to trade via an EDI system to increase process efficiencies and remove delays, errors and communication breakdowns.

Be best in class! Greentree's EDI system allows you to meet electronic trading demands with highly flexible and easy-to-use software, managing your trading relationships automatically and transparently.

Included	How does it make a difference?
Pre-built Business Document Templates	Get started immediately with pre-built templates for use across a wide range of industries.
Powerful Mapping Capability	Lets you quickly and easily map and translate partner document types to Greentree documents.
Full Integration	Unlike third-party offerings, Greentree's EDI system is totally integrated delivering speed, a collapsed supply chain and elimination of errors.

eREQUISITIONS

Switched-on suppliers proactively help customers to identify inventory shortages and rapidly respond to demand. Greentree's eRequisitions suite provides immediate web access for purchasing, approval, pricing, delivery and availability. Your team can get the right outcome at the best possible price for your customers anywhere, anytime.

Included	How does it make a difference?
Universal Access	Available anywhere you have access to the web. Live link directly to the Greentree system with all the features you need to raise and manage requisitions. Attach any number of supporting documents to capture all the necessary information. View and approve requisitions, monitor status and search inventory. View requisitions through permissions-based enquiries.
Supplier Participation	Empower suppliers to raise requisitions for items on your behalf and subject to your approval, to optimise on-hand balances based on their intimate knowledge of production and delivery lead times. Security and control is tightly managed with tiered access levels.
Rapid Deployment and Implementation	Simple to install and get you up and running quickly. Pre-built Greentree templates are provided to use 'out of the box' or give you the flexibility to tailor your web experience.

RETAIL POINT OF SALE

Greentree's fully integrated Point of Sale (POS) leverages the core capabilities of the Supply Chain and Distribution suite to give you the flexibility to easily manage retail sales within your operation.

Included	How does it make a difference?
Point-of-Sale Stations	Easily set up locations, segmentation and user preferences by workstation using a variety of configuration options. Access all transaction entry requirements through one easy-to-use screen with the option of restricting access to functions by user preferences.
Platform Support	Easily carry out implementation as standard POS technologies are supported e.g. cash draws, barcode scanners and docket printers. Accept a variety of credit and debit card payment options as well as cash and cheques.
Integration with Greentree	Take advantage of Greentree's powerful integration to ensure live links to inventory, pricing and customer accounts.

9 JOB COST MANAGEMENT

The profitability of your 'projects' business rests on how quickly and accurately you allocate time, resources, materials, purchases and revenues to jobs and projects.

Give your business the agility it needs to respond to customer needs more effectively and profitably than your competitors. Greentree's Job Cost Management suite delivers the visibility and financial insight you need to take the lead.

JOB COST

Empower your managers with the tools they need to define and view real-time job status and profitability for ultimate efficiency and cost controls.

Included	How does it make a difference?
Flexible Job Structure	Meet any business need with unlimited-level job structures (sub-jobs, phases, tasks).
	Use pre-defined templates to ensure new job creations are quick and easy.
	Get the full picture with analysis and reporting at any level of the job or at a summary level.
	Eliminate the complexity of cost apportionment and billing with the option to split jobs across different customers.
Enterprise-wide Control	With total integration across all Greentree modules, allow for costs to be captured and analysed in the most meaningful way and have an accurate up-to-date picture of your costs and revenue at any time.
Financial Management	Turn quotes into estimates to track actual costs against estimates.
	Maximise your revenue and cost more precisely than ever with the unlimited ability to set cost and sell rates right through to specific material costs and labour activities.
	Take charge of every project as all cost transactions update the General Ledger work-in-progress account, ensuring you always know exactly how closely a job is tracking to budget and time frame.
	Eradicate billing errors with multiple-price books and pro forma invoicing.
Planning Boards	With highly visual planning boards, the status of all jobs can be tracked in real-time.
Analysis and Reporting	Get started immediately with pre-built and easily tailored management and operational reports.
	Use the extensive filtering capabilities to make reports and enquiries possible down to the most detailed level.

ADVANCED JOB COST

Boost your job-management effectiveness with these sub-modules that deliver expanded levels of control for project costs, revenue and accountability.

Included	How does it make a difference?
Financial Control	Manage the prepayment of invoices and the ongoing draw-down during the life of the job, ensuring invoicing is clear for the customer.
	Slash the risk of errors and fraud with full invoice audit trails.
	Keep on top of variations as invoices are automatically validated to estimates using your own defined Alerts.
	Manage out-of-scope problems with estimate variations to control cost escalations.
	Have greater control over pricing with date-based price books.
Revenue Recognition	Calculate revenue, based on percentage of completion and recognise revenue as it is earned during the life of the job.
	Base calculations on the methods used in your business.
	Better predict future income and project outcome by being able to forecast remaining revenue.
Retention Management	Use a retention percentage to calculate the value to claim up to a specified maximum of the contract sum.
	Allow for the retention amount to be included as revenue for the job and placed on hold to be reclaimed after applicable warranty and defect liability periods are satisfied.

GREENTREE4TIMESHEETS-MOBILE

Whether you're in the field or back in the office, Greentree4Timesheets-Mobile enables you to accurately record time against the work you're doing – in summary or detail. And it is really easy to use; configure fields the way you want them with in-built reminders to ensure your timesheet's never running late.

Included	How does it make a difference?
Summary or detail	Record the total time recorded or log all the detail of start, finish and break times. Save at any point, then return to add more detail before submission.
Easily configurable	Capture time based on work done, who did it, job rates or any other variable – makes sure maximum revenue charged for the work completed.
Format it your way	Using Screen Designer tailor Timesheets-Mobile to work the way you want it to; reorder or hide fields and columns, change labels – work it your way.
Built in reminders	Users are alerted if they're late with timesheets or too little (or too much) time appears to have been recorded.
Approvals	Use Approvals and Alerts to enable real-time approval plus manage queries on a line-by-line basis so the rest of the time sheet can be submitted on time.
Summary view	Instantly scan the total hours recorded against the hours scheduled.
Work anywhere	Designed for the field; browser-based access to ensure the most timely capture, minute-by-minute, as you work.
Cross company	If you work for a group of companies, each company is assigned a line in your timesheet with the related jobs automatically displayed when selected.
On a roll	More functionality is continually being rolled out. Check with a Greentree Partner for the latest update.

MICROSOFT PROJECT INTERFACE

If you use Microsoft® Project for your task and resource planning, Greentree's Microsoft Project Interface delivers a user-friendly link between Greentree and Microsoft Project.

Included	How does it make a difference?
Task and Resource Planning Using Built-in Wizards	Eliminate the need for double entry with the three inbuilt wizards, allowing Greentree to manage the information flow between Greentree and Microsoft Project for resources, tasks, estimates and percentage complete.

GREENTREE **4**

MKNAIG
THE
CMLOPEX
SIMPLE

10 MANUFACTURING

Managing manufacturing is a challenge; predicting demand, correctly analysing material and resource requirements, production planning and ensuring quality output all form part of a manufacturing business's essential activities. Even small errors can have damaging downstream consequences in terms of productivity, quality, sales and ultimately profitability.

Put yourself in charge with Greentree's Manufacturing suite, a management tool that handles the issue of raw materials and finished goods receipts and allows you to track the progress of Factory Orders in real-time. Integration with both the Financial Management and Distribution suites makes accurate Materials Requirements Planning (MRP) and forecasting to optimise production planning a breeze.

BILL OF MATERIALS

Bring together planning, labour and resource management with Greentree's Manufacturing suite. At its heart is the Bill of Materials module which allows you to define exactly what and how many parts, components or materials are required to complete a production run.

Included	How does it make a difference?
Manage Product Structures	Manage potentially thousands of component parts or materials which can be defined and organised into easily managed multi-level structures.
	With no rigid Bill of Material structures required, give your team the freedom to include additional materials during manufacture or to replace defined materials with alternatives.
	Radically reduce wastage and optimise production efficiency with the power to set batch sizes to match your production run.
	Using fixed and variable cost structures, have the power to account for costs that are not dependent on quantities e.g. set-up or clean-down time.
	Use phantom Bill of Materials to build non-stocked sub-assemblies, allowing a single point of management for common structures that apply across multiple products.
Financial Visibility using Cost Roll-up	Discover the true total cost of producing products or services using cost roll-up which automatically updates the manufactured costs.
	Get to grips with your product component costs with the ability to drill down to the smallest level.
Graphical Representation	Make use of graphical representation to add shape and flow to what could otherwise be a seemingly complex Bill of Materials structure.
Enquiries and Reporting	Empower managers and planners to make fully informed decisions with the wide range of flexible enquiries and reports.
Control Resource and Labour Costs	Control labour and other resource costs by means of a straightforward mechanism.

MATERIALS REQUIREMENTS PLANNING

The MRP module references key business activities as well as information across your business including all levels in the Bill of Materials, sales forecasts, sales orders and inventory.

Greentree's MRP module drives improved production management using industry-standard techniques.

Included	How does it make a difference?
Materials Planning	Determine exactly what and when materials are required to produce the most timely and competitively priced products and services.
	Use multiple runs to simulate 'what-if' scenarios for evaluating alternative operating strategies.
MRP Generation Options	Configure Greentree's MRP to suit your business using any one of four industry-standard options (Sales Orders, Forecasts, Sales Orders and Forecasts, Sales Orders and Consumption Forecasts).
Inventory Management	Ensure uninterrupted production with the facility to calculate what and when materials are required, where they are to be sourced from and where they are needed.
'Trees' and Critical Items	Be equipped to carry out more refined analysis by separating out high-value/long-lead-time inventory items from low-value short-lead-time items.
	Flag an item as critical to focus the production plan on just this item and observe the effect of change.
Production Planning	Slash productivity wastage with the intuitive visual planning board and reports.
Action Messages	Take control of exceptions and production delays with proactive action message alerts, e.g. scheduled receipts, overdue purchase orders and re-scheduling of existing orders.
Not Just for Manufacturing	Although typically associated with manufacturing, be open to using Greentree's MRP in a variety of other environments e.g. distribution and sales, without the need for Bill of Materials and Factory Orders.

FORECASTING

Get a grip on the future with Greentree's Forecasting module that uses historical sales data, industry algorithms, seasonal fluctuations and human experience to forecast future inventory requirements.

Included	How does it make a difference?
Visibility of Projected Period Sales	Make accurate future sales forecasts based on historical data using mathematical modelling (linear or curve fitting) of sales history. Automatically generate forecasts as far out as you require. Sales per item reports, based on sales history, arm you with the information to generate recommendations for manufacturing and sales projections.
Fine-tune with Manual Adjustments	Remember, you're never locked in. Manual override of system-generated quantities allows for unusual events, seasonal changes, new product lines, distribution channels or unexpected demand peaks or troughs. Provide for flexible modelling to do 'what-if' forecasting.
Feed into MRP Process	Minimise the costs associated with stored inventory by using multiple forecasts from Greentree's MRP module to calculate the material requirements.

FACTORY ORDERS

The end result of Materials Requirement Planning and Bill of Materials, Greentree's Factory Orders module, puts you fully in the picture on what products you need to produce.

Included	How does it make a difference?
Inventory Management	Slash production time and error rates with the straightforward Factory Order initiation with all options automatically selected. Make manual adjustments to the Factory Order during production to reflect the actual production picture, not just what was planned. Choose whether to auto-issue on commit or back-flush materials for the production run to take charge of your variances.
Manufacturing Planning Board	View your planning schedule graphically with the option to drag and drop Factory Orders into the optimum production sequence with the added benefit of an export into Microsoft Excel.® Optimise productivity by fine-tuning production right down to minutes within each hour. Get the very latest picture as the Factory Order situation is updated live to the Planning Board as new orders are created and receipted.
Manufacturing Variance Reporting	Hone your future planning with the facility to identify the differences between the Bill of Materials' standards and actual usage.

QUALITY CONTROL

Eliminate the costs associated with dissatisfied customers by means of an efficient quality assurance plan. Greentree's Quality Control module automates all the necessary quality control processes.

Included	How does it make a difference?
User-defined Configuration	Decide what tests, what classification each test belongs to, who will perform the tests and what approvals and alerts are required - all in the manner that suits your manufacturing or distribution process.
Track and Traceability	Keep on top of the details with the ability to track products right through to customer by serial number, batch or user ID, at every stage.
Compliance with Standards	Pre-define standards in your classifications and ensure that faulty goods are never released.
Workload View	Allow for every relevant staff member to have an up-to-the-minute view of what needs to be done as all tests and results are fed through to a workload enquiry.
Environmental and Asset Testing	Schedule and manage the testing of assets (e.g. health and safety or contamination testing) or environmental testing (e.g. freezer temperatures) to ensure full compliance.

11 CUSTOMER RELATIONSHIP MANAGEMENT

At the core of every business are the relationships between the organisation and its customers. When these are poorly managed your brand is damaged, you lose sales and miss new business opportunities.

Greentree's Customer Relationship Management (CRM) suite delivers the total solution: from enabling highly effective marketing efforts, identifying sales opportunities, tracking contacts and their buying behaviours, right through to full integration into mission-critical financial and distribution suites.

CONTACTS AND RELATIONSHIPS

Greentree's CRM suite captures all the information you need to effectively manage the relationships you have with your customers, suppliers and other organisations.

Included	How does it make a difference?
Organisations, Contacts and Relationships	Manage all your relationships from one system. Capture and organise all your business and contact information. Use automatically generated organisation charts to visually present organisation structures.
Data Management	Importing and de-duplicating of data is quick and easy. There is no need to store and maintain mailing lists externally. Email or postal lists are always accurate and up to date.
Data Security	Protect the confidentiality of your sensitive data.
Integration with Microsoft® Office	Get the power and familiarity of existing desktop software with direct integration to Word, Excel, Outlook and other mainstream email systems.
Document Management	Review customer communications, documentation and records with easy, on-demand document retrieval and storage.

SALES AND MARKETING

Manage your business opportunities, leads, prospects and pipeline with Greentree's Sales and Marketing module.

Included	How does it make a difference?
Sales Cycle Management	Manage the entire sales life cycle from first contact right through to invoicing. Drive the performance of your sales team using methodical, user-defined action plans. Identify and action opportunities to improve revenue through tracking buyer behaviour and trends.
Marketing Campaigns	Dramatically improve your marketing results using highly targeted lists. Simplify the effort involved using built-in email, telephone, mail-out and event management tools. Enhance campaign effectiveness with automated response management. Set and measure campaign goals to control costs and results.
Quoting Engine	Eliminate quoting errors with immediate access to accurate, customer-specific pricing. Stay in control throughout the quote lifespan with version control that tracks right through to sale and reporting on outcomes. Convert quotes to invoices, sales orders or jobs to drive productivity improvements.
Total Visibility with Microsoft® Office Integration	Deliver faster results using the familiar desktop software tools for email and mail merge. Manage tasks and appointments without having to adopt new systems.

GREENTREE4SALES-MOBILE

Greentree4Sales connects your sales engine to your business engine in the most powerful way possible. Using the latest browser-based technology for a powerful sales performance from your desk, on the road or where ever you may be. Refer for Greentree4Sales-Mobile.

Greentree4Sales-Mobile Workspace

BOOKINGS MANAGEMENT

Managing events and co-ordinating resources is a breeze with Greentree's Bookings Management module.

Included	How does it make a difference?
Resource Planner	Maximise valuable resource capacity and revenue with the user-friendly calendar format planner that gives staff a visual view of bookings (showing venues, staff, volunteers, equipment etc). Keep your eye on the full picture with the reporting tools.
Attendee Management	Quickly and easily create targeted invitation lists with the range of filtering and selection tools available. Drastically improve attendee communications with built-in email and mail merge actions.
Financial Management	Ensure your event co-ordinator uses the financial summary to be in full control of the event's financial position. Dramatically reduce administrative overhead and co-ordinate collections with direct integration between invoicing and accounts receivable.

FUNDRAISING

Managing pledges and donations is easier and more efficient than ever with Greentree's Fundraising module.

Included	How does it make a difference?
Donations Handling	Receipt and acknowledge donations easily with automatic generation of tax invoices. Improve donor relations with easy gifts and rewards that are integrated directly into inventory.
Pledge Management	Significantly reduce administration costs with the ability to manage pledges made that are ready for receipting or follow-up. Forecast easily with the high visibility of funds received and funds pledged.
Donor Management	Enjoy the management benefits of seeing the whole picture with an intuitive interface to other CRM modules. Drive improved campaign results by being able to identify target lists based on past giving profiles.

KNOWLEDGE BASE

Drive customer service and productivity improvements with Greentree's Knowledge Base module: a framework for systematically storing information and providing flexible yet secure internal and external access.

| Included	How does it make a difference?
Document Library	Ensure consistency of information across the board (e.g. product data, procedures, FAQs, support documentation, specifications). Effortlessly retrieve information with the simple contextual search function. Easily configure your exact information needs using the flexible library structure.
Communication Engine	Communicate with contacts directly from within the library by sending pages and attachments using the integrated email function.
User-defined Access	Radically reduce the number of support calls by giving customers and field staff access to the information library. Control which teams or customer groups have access to specific sections of the library. Protect the security of your data with confidence. Easily access the library from anywhere with the web interface.
Document Archive	Use the built-in version control feature to eradicate problems caused by incorrect documents

12 SERVICE & ASSET MANAGEMENT

Whether your organisation grapples with internal service and equipment maintenance demands or you are a service provider delivering to meet customer expectations, missed service calls, overlooked requests, late maintenance, unscheduled downtime, cost overruns and potentially unbilled service delivery all erode business performance. Eradicate these risks with Greentree's Service and Asset Management suite: all the tools needed to maximise service levels provided to internal or external 'customers' and to effectively manage the diverse needs of plant and equipment maintenance. Greentree is a complete ERP solution which means all processes are automatically integrated with your other Greentree business functions such as purchasing, inventory, fixed assets and occupational health and safety.

GREENTREE4SERVICE-MOBILE

Transform the way your field service staff work with the latest roll out of our next-generation browser-based capabilities. See pg 25 for more information.

GREENTREE4TIMESHEETS-MOBILE

Turn time into money with Timesheets-Mobile. Accurately record time at a summary or detailed level, in fields that have been configured to make sense to the way you like to work. If you work across several companies, we've thought of that too plus there are in-built reminders to make sure your timesheet's never running late. If capturing time is important to the way work, you won't want to work without it. See Job Cost section pg 40 for more information.
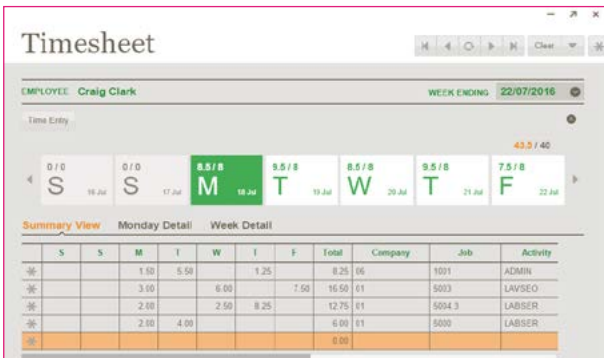
eSERVICE

Give your customers access to the self-service information systems they expect and ultimately remain satisfied doing business with you. Greentree's eService module is an easy-to-use system for customers and staff to interact with your business on the web.

Included	How does it make a difference?
Self-service Management	Give customers, resellers and staff the ability to raise and track service requests resulting in better communication and faster issue resolution. Establish a single point of reference through the unlimited ability to attach documentation to any record.
Rapid Implementation	Get started quickly with eService; designed for rapid implementation into almost any service-based organisation with a wide range of built-in functions.
Access to Knowledge Base	Watch your service costs plummet by offering users the ability to resolve their own issues within a secure environment without having to contact your Help Desk.
Live Update	Have information presented on live workflow desktops giving instant visibility of service calls and greatly improving issue resolution times.

CUSTOMER SERVICE

Achieve the highest customer-satisfaction levels in a support or service environment. With full integration to the rest of Greentree, costing and billing of service work becomes a natural part of how you do business.

Included	How does it make a difference?
Service Planning and Management	Optimise service response rates and resource effectiveness with the easy-to-use visual planner. Successfully meet all service-level commitments using pre-emptive escalations and alerts. Demonstrate effectiveness with the built-in tools to measure and report on performance. Easily manage customers and services across multiple locations and time zones.
Help Desk	Drastically cut the costs of customer support requests (received via web, phone or email) with full tracking, task allocation and follow-up actions. Put the squeeze on time to resolution using the built-in call routing and workflow planning. Realise opportunities for improvement with detailed call analysis by category. Empower staff to solve problems quickly with access to information libraries and details of client histories, known problem alerts and the knowledge base.
Field Service Capability	Drive performance excellence with easy routing and management of issues that require field service assistance. Promote proactive work planning with individualised work schedules that can be accessed remotely.
Cost and Billing Management	See service delivery costs plummet by controlling and monitoring time and associated materials costs of service deliveries. Maximise revenue when you get paid for every service delivered.
Contracts and Service Level Agreements	Manage your customers your way with flexible definition of support and maintenance contracts. Dramatically improve outcomes with all response and resolution times reported against budgeted times.
Inventory Management	Tighten up management of inventory and match service requests to asset for maximum uptime.

ASSET MANAGEMENT

Take control of your assets with Greentree's Asset Management system: a fully integrated solution that gives you the power to manage your entire Planned/Plant Maintenance requirements, from the management of the assets, servicing of the assets, and detailed cost breakdown of owning and maintaining the assets.

Included	How does it make a difference?
Asset Profiles	Be in control by having an up-to-date picture of physical assets, including those within your organisation, those serviced at external locations and those that have been sold but are maintained under a warranty or service contract with a customer.
	Drastically reduce the complexity of asset management with the ability to categorise your assets and better understand the implications of ownership or servicing, e.g. what parts are required.
Scheduled Maintenance	Control what inventory can be issued/used on each piece of equipment.
	Minimise equipment downtime through predicative and well-planned schedule servicing.
Track All Asset Events	Build a complete picture of the asset service history with the automatic asset event tracking that logs all actions, e.g. placing the asset on loan, any repairs, servicing, disposal and other customer-specific events.
	Identify problematic trends and quickly eradicate root causes of unscheduled downtime.
Fixed Assets*	Easily link assets to the Fixed Assets Register for financial management, e.g. depreciation.

13 TECHNOLOGY & PLATFORMS

Greentree has an outstanding track record of using the best technologies to produce solutions that are fundamental to business performance. We don't jump on every new tech bandwagon; we focus on technologies that truly deliver long-term business benefits. Two of our platforms highlight some key strengths of Greentree: operational security and software delivery.

GREENTREE SECURE

Most businesses know that a bullet-proof backup & recovery strategy is fundamental to operational security – a company's very survival can depend on it if disaster strikes. But the advent of e-commerce has created new vulnerabilities that too many businesses don't have well-covered. Electronic transactions can be lost forever if your system crashes, and the ideal backup & recovery process should not only ensure that all data is retrievable, but also that you are operational again within minutes. Greentree Secure is the answer.

Included	How does it make a difference?
Data Backup	Backup process is multi-threaded, making the process faster. Backups can be done independently, so the speed and performance of other tasks are not affected. Automated backup folder naming means easier administration and management.
Site Management Console	Easy-to-understand live visibility of backups and recoveries
Data & Operational Recovery Options	A range of choices is available, to suit business needs. **Instant Secure** (licence required): Includes rapid hot swap – a live standby system ready to go if primary system crashes. Multiple hot swaps can be kept at multiple locations (eg: in the cloud) for greater recovery flexibility. **Total Secure** (licence required): Ensures Greentree can be recovered to a point prior or up to the point of failure when the time to recover is not critical. **Partial Secure** (comes with Greentree System Manager): For businesses that don't use web or mobile apps, and that maintain a complete paper trail that can be used to re-key data lost between the time of failure and their last good backup.

PRIMED4U

Greentree's PRIMED4U software deployment strategy is a unique approach that breaks through current restrictive market practices for software delivery. No more waiting for annual releases; new enhancements are ready for you to use as soon as they're released. It also lets you apply updates and changes to standard and custom software solutions according to a schedule that suits you, thus minimising business impact. It means you're always up to date – and primed for business.

Included	How does it make a difference?
PRIMED	Greentree's continuous release strategy ensures your system is always up to date.
4U	Flexible update options allow you to choose when to upgrade.
Automated update process	Upgrades are simple, well controlled, and in proper sequence, via a single application.
Managed customisations	Customisations and discrete add-ons are managed as part of the update process, avoiding traditional conflicts between standard products and customisations.
Connection Manager	All users are kept up to date automatically.
Updated help	Detailed information about updates available to users as soon as changes are applied.

GREENTREE API

Greentree's API connection engine enables data to flow both ways, enabling all your applications to effectively 'communicate' with Greentree. See pg 18 for more.

DEPLOYMENT AND LICENSING OPTIONS

With Greentree there is no "best option", it's all about choosing the option that is best for you. Our Greentree Partners are best placed to help you to assess your deployment and licencing options based on what your business needs now and is likely to require in the future. No matter which option you choose, you get the full functionality of Greentree4 to turn your business into a competitive, cost-effective, powerhouse.

Greentree offers three very different deployment options that all deliver the same full functionality of Greentree4 ERP software to your business.

ON-PREMISE

The traditional way to host an ERP business management solution. Greentree4 hosted on a physical server on your premises, or elsewhere – a high performance solution that is a joy for your IT team to manage and maintain.

Included	How does it make a difference?
Easy upgrades	Upgrade when you want to, with minimal disruption
Highly configurable	Configure the software how you want it to work – don't change how you work to fit the software
Integrated database	Create one version of the truth that your entire organisation can work from.
Mobile access	Access data via a browser – empower your staff and customers with remote access to core data and modules.

CLOUD-HOSTED

The same Greentree4 software you host on a server, can be just as easily hosted in the cloud. Your cloud, a public cloud or our highly popular AOD for Greentree cloud hosting solution. A full range of security, back-up and recovery options available.

Included	How does it make a difference?
Access from anywhere	Perfect for companies with multiple offices and organisations that operate across multiple countries.
Highly configurable	Maintain all of your ability to configure Greentree4 to work the way you do; connect to other software applications and devices with ease.
No infrastructure required	All your computing power is provided by your cloud host; all you need to provide are the internet connected devices for your staff.
Scale with ease	Scale licenced users on a permanent or temporary basis based on your business needs.
Mobile access	Access data via a browser – empower your staff and customers with remote access to core data and modules.

GAAS (GREENTREE AS A SERVICE)

A classic Software as a Service solution with an all-in-one monthly subscription that covers the software, cloud hosting, back-up and recovery, maintenance and support. GaaS ignites any rapidly growing business requiring a high-performance business management engine without the upfront infrastructure costs.

Included	How does it make a difference?
Single tenant cloud hosting	Your database sits in its own cloud space; configure it how you want, retrieve the data when you want and operate with absolute confidence.
Rapid installation	No upfront investment in infrastructure and you can get underway with installation in a day.
Highly secure	Comes with Greentree Secure back up and data recovery.
Scale with ease	User-based licencing means you only pay for what each staff member needs; add and subtract staff when you want to.

LICENCE OPTIONS

Having selected your software, now choose the way you are going to licence it:

Included	How does it make a difference?
Standard licence	Pay once, use the software for a lifetime. Host on a physical server or in the cloud. Maintenance and support are paid annually. You choose the services and infrastructure that best fits your business.
Subscription licence	As above but pay for your software on a monthly or annual subscription.
Greentree as a Service (GaaS)	All of your software, cloud hosting, maintenance and updates bundled into a monthly user-based subscription.

Greentree®

PRIMED FOR BUSINESS