

# GreenTree

Product Summary

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1

**Business Process  
Management &  
Workflow**

# 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. Traditionally, process management has involved a few good people supported by some basic printed documentation. But how effective are those 'old ways' in today's rapidly changing world?

It is this very dependency on people that makes the traditional approach to business process so fragile. Humans are not good at undertaking repetitive tasks consistently. For various and often well-intentioned reasons, people like to try to change things, especially if there are several personnel involved. New staff may be ill-informed, lack confidence or be dependent on outdated manuals. Communication between people can be misinterpreted, patchy and riddled with presumptions. Perhaps most importantly, people fear visibility and transparency of information, meaning when something goes wrong, that's when they are most likely to try to hide the facts.

Put the problems of relying on people to manage process alongside the rapid advances in technology that are opening up multiple new channels for communications, supply chains and inventory management, and watch the cracks turn into chasms

And finally, add to this the fact that expectations of what constitutes good service continues to rise exponentially and we can see how the 'old ways' are putting your business at risk.

So what makes Business Process Management (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

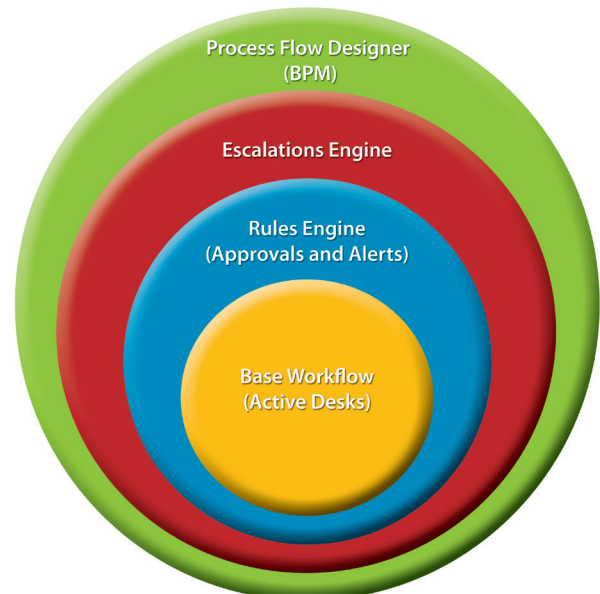
Because businesses of every size benefit from BPM, Greentree's modular solution allows you to gradually unleash the power according to your needs and incremental investment capability.

### 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 Desktops give you the total role-based visibility you need to start making effective informed decisions by knowing exactly what is happening in your business.



# 1 Business Process Management & Workflow

## 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 where all the components come together in a planning system that allows you to graphically build both simple and complex processes.

## Information and 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. Greentree's Active Workflow module is a dynamic and proactive management tool that delivers a rich insight into business productivity.

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.

**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 and Alerts

Enjoy the control provided by Greentree's Approvals and Alerts module, 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.

# 1 Business Process Management & Workflow

## 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.

# 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.

## Pervasive Information Access

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 access to your information far beyond the boundaries of traditional solutions.

Included	How does it make a difference?
Workflow with 360 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.
Business Analyst	Be able to make better business decisions through the pre-built models, graphs and tables generated 'on the fly' from within Greentree.

## 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 (FREE)

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 for more information about FREE 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.

## 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.



# 3

**Business  
Intelligence –  
Greentree IQ  
(Powered by  
QlikView)**

# 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.

**Greentree IQ** Powered by **QlikView**

4

eBusiness

# 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 for more information.
eCRM	Allow customers and staff to manage CRM information over the web with access for an unlimited number of users.  **See the Customer Relationship Management section for more information.
eService	Empower customers, resellers and staff to self-manage service delivery from start to finish.  **See the Customer Relationship Management for more information.
eHR	Give staff the tools to manage their own HR records and leave requests  **See the Human Resources section for more information.
eTimesheets	Ensure project management and billing is more accurate and timely than ever by having -employees submit their times and expenses via the web from anywhere  **See the Job Cost section 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 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 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 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 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 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 field staff's efficiency by 20%, totally eliminate administrative functions, reduce data errors by up to 100% and increase customer satisfaction dramatically, simply by introducing mobile business applications. Industry studies have shown over 400% return on investment (ROI) in businesses using mobile solutions.\*

Mobile solutions are traditionally regarded as complex and difficult. In designing our mobile solution we researched these limitations including multiple technology layers, fragile interfaces, limited functionality and complex and costly deployment.

Greentree Mobile, with its 'Power of One' architecture, has broken the mould to unleash the power of your enterprise system and liberate your mobile workforce. The 'Power of One' is a unique convergence of technology, standards, functionality and deployment into a single, end-to-end solution:

- One comprehensive functionality set from server to mobile
- One technology layer from server to mobile
- One deployment and update process from server to mobile
- One solution provider so you can install 'out of the box' with no third-party interfaces required.

## Greentree Mobile - Solution-wide features

Included	How does it make a difference?
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 and Attachments Capture	Capture signatures and images to complete field documentation.

## Mobile Sales Management

Maximising sales potential from customer accounts, delivering customer orders rapidly and accurately, and providing the best-possible levels of customer services are goals all businesses strive to achieve. With Greentree Mobile Sales you get rid of the cumbersome paper systems and unleash your sales staff so they can see more customers each day, make each engagement more effective and process orders immediately and accurately.

Included	How does it make a difference?
Quotations	Empower your sales staff to prepare quotations on location to immediately capture, manage and report on sales opportunities.  Manage quote revisions, free format notes, 'win confidence' ratings, delivery details and expected order and delivery dates all from your mobile device.
Sales Processing	Allow for sales orders to be entered on the spot either from scratch or from an existing quotation.
Products and Pricing Availability	Eliminate ordering errors with the ability to check customer-specific price and availability of any inventory item by a range of categories including those on hand, committed and on order.
Customer Account Management	Drive improved customer service with tools that enable staff to answer customer queries, view customer financial status and sales history, provide quotations and raise sales orders on the spot.

## Mobile Field Service

Best-in-class service companies use mobile field service solutions to drive high performance.\* Empower your service personnel with immediate access to their next work request, parts availability and the ability to capture time and materials on the job.

Included	How does it make a difference?
Service Requests	Enable field staff to view the latest information about the schedule of work assigned to them and to report back on the exact nature of the problem, the actions taken, the outcomes and the signature of the client for approval.
Job Management	Manage complex service jobs or projects that involve multiple service requests.
Issue Inventory	Slash errors by allocating and charging inventory immediately to the job or service request with exact quantities and costs.
Timesheets	Use the timer function to allocate and charge time.  Eliminate delays between completing the work and billing by having clients sign off on timesheets.

# 5 Mobile Solutions

Asset Management\*\* Get the full picture on assets e.g. location, service history and usage, and capture changes.  
Proactively trigger unscheduled service jobs while on site.

## Mobile Warehouse Operations

Your business is probably already running lean and delivering quality products and services with efficient processes. How can you go further and increase productivity, reduce costs, improve process efficiency and increase revenue without major effort or staff upheaval?

Greentree's 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.

\* Mobility in Today's Service Organisation, Aberdeen Group

\* Business Benefits of Industry-Specific Mobile Applications, IDC

\*\* Greentree Mobile is rapidly evolving. To check the current applet availability, please visit [www.greentree.com](http://www.greentree.com)

# 6

## Financial Management



# 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 entity 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® (FREE)

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 FREE 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®.

# 6 Financial Management

## 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's 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.

## 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	<p>Save time and administration costs in managing a large number of assets using the flexible asset grouping structure.</p> <p>Use serial numbers to easily keep track of assets and their location across the business.</p>
Fully Integrated Operation	<p>Streamline asset purchasing and remove double handling as you raise a purchase order and post payables directly to the asset ledger.</p> <p>Automatically post depreciation across jobs and projects to ensure accuracy of costs.</p>
Valuation Management	<p>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.</p>
Forecasting Facility	<p>Plan for the movement of assets in and out of your business.</p> <p>Easily monitor and incorporate changing conditions as they arise.</p> <p>Use 'what-if' scenarios to plan for the impact of depreciation.</p>

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

# 7 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	<p>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.</p> <p>Make accurate product reorder decisions armed with full demand history and forecasts.</p> <p>Sell to any market or customer currency requirement.</p> <p>Boost your pricing competitiveness with accurate landed inventory costs.</p> <p>Trace items by serial or lot number, use-by date or even when superseded or obsolete.</p> <p>Reward customers with pricing unique to them.</p> <p>Clearly identify items with system-produced receiving and retail labels.</p>
Effective Warehouse Management	<p>Live updates from throughout Greentree mean precise inventory quantities by location and warehouse right down to serial/lot/dimension level if required.</p> <p>Eliminate picking or put-away errors and boost productivity using mobile handhelds and barcodes.</p> <p>Maximise warehouse space utilisation and optimise multi bin management with automated picking and put-away advice.</p> <p>Always have goods on hand, with Greentree's automated replenishment processes.</p> <p>Keep the doors open and trade right through an inventory count process.</p>

## 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	<p>Empower frontline sales staff with instant access to customer-specific pricing by currency, item and quantity.</p> <p>Offer alternative or complementary items, source from another location, back-order and give realistic time frames for delivery.</p> <p>Prompt customers to increase orders by providing visibility of their previous purchase history.</p> <p>Save customers' time and speed up sales processing with one-click prior-order activation.</p> <p>Proactively manage sales for customers with overdue balances, to avoid over-extending their accounts.</p> <p>Capture sales directly from customers in the field with mobile sales entry.</p> <p>Skyrocket sales - see absolutely everything you need to know, when you need to know it, with Greentree's 360 Live dynamic desktops.</p>
Streamline Delivery	<p>Link back-ordered items directly to purchases and drop-ship to customers.</p> <p>Fully inform your customers with the exact status of every item in their order at any time.</p> <p>Ramp up the efficiency of deliveries with co-ordinated delivery 'run/drop' sequences.</p>

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

## 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.

## 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	<p>Available anywhere you have access to the web.</p> <p>Live link directly to the Greentree system with all the features you need to raise and manage requisitions.</p> <p>Attach any number of supporting documents to capture all the necessary information.</p> <p>View and approve requisitions, monitor status and search inventory.</p> <p>View requisitions through permissions-based enquiries.</p>
Supplier Participation	<p>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.</p> <p>Security and control is tightly managed with tiered access levels.</p>
Rapid Deployment and Implementation	<p>Simple to install and get you up and running quickly.</p> <p>Pre-built Greentree templates are provided to use 'out of the box' or give you the flexibility to tailor your web experience.</p>

## 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.

# 8

## 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	<p>Meet any business need with unlimited-level job structures (sub-jobs, phases, tasks).</p> <p>Use pre-defined templates to ensure new job creations are quick and easy.</p> <p>Get the full picture with analysis and reporting at any level of the job or at a summary level.</p> <p>Eliminate the complexity of cost apportionment and billing with the option to split jobs across different customers.</p>
Enterprise-wide Control	<p>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.</p>
Financial Management	<p>Turn quotes into estimates to track actual costs against estimates.</p> <p>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.</p> <p>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.</p> <p>Eradicate billing errors with multiple-price books and pro forma invoicing.</p>
Analysis and Reporting	<p>Get started immediately with pre-built and easily tailored management and operational reports.</p> <p>Use the extensive filtering capabilities to make reports and enquiries possible down to the most detailed level.</p>

## 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	<p>Manage the prepayment of invoices and the ongoing draw-down during the life of the job, ensuring invoicing is clear for the customer.</p> <p>Slash the risk of errors and fraud with full invoice audit trails.</p> <p>Keep on top of variations as invoices are automatically validated to estimates using your own defined Alerts.</p> <p>Manage out-of-scope problems with estimate variations to control cost escalations.</p> <p>Have greater control over pricing with date-based price books.</p>
Revenue Recognition	<p>Calculate revenue, based on percentage of completion and recognise revenue as it is earned during the life of the job.</p> <p>Base calculations on the methods used in your business.</p> <p>Better predict future income and project outcome by being able to forecast remaining revenue.</p>
Retention Management**	<p>Use a retention percentage to calculate the value to claim up to a specified maximum of the contract sum.</p> <p>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.</p>
Milestone Billing**	<p>Set milestones by job, phase or task and track status e.g. in progress, ready to bill and billed.</p> <p>Define milestones manually or automatically and prompt for milestone invoices to be produced during billing cycles.</p>

## 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	<p>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.</p>

## eTimesheets

Manage employees' time effectively and watch your profitability soar. Greentree's eTimesheets module gives employees the tools to submit their time and expenses via the web, breaking down the barriers previously posed by long-term on-site projects or remote locations and ensuring billing is prompt and accurate.

Included	How does it make a difference?
Time Management	<p>Keep things simple with web forms that make it easy for staff to submit time records.</p> <p>Use the configurable controls to ensure staff are guided to give the right information every time.</p> <p>Eliminate repetitive data entry with time-captured tools that update both Job Cost and Payroll modules.</p> <p>Drive compliance with automatic email reminders about missing timesheets.</p>
Expense Recording and Invoicing	<p>Slash the administration costs associated with timesheets as employees or external contractors enter expenses or invoices that flow through to Accounts Payable.</p>
Document Management	<p>Eradicate unnecessary approval costs and disputes with the option to attach customer-approved timesheets or expense claim invoices.</p>
Approvals	<p>Have greater control over cash flow and prompt and accurate invoicing with single or multi-level approval of timesheets.</p> <p>Safeguard full accountability by ensuring submitted expenses remain on hold until approved.</p>

# 9 Manufacturing

# 9 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	<p>Manage potentially thousands of component parts or materials which can be defined and organised into easily managed multi-level structures.</p> <p>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.</p> <p>Radically reduce wastage and optimise production efficiency with the power to set batch sizes to match your production run.</p> <p>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.</p> <p>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.</p>
Financial Visibility using Cost Roll-up	<p>Discover the true total cost of producing products or services using cost roll-up which automatically updates the manufactured costs.</p> <p>Get to grips with your product component costs with the ability to drill down to the smallest level.</p>
Graphical Representation	<p>Make use of graphical representation to add shape and flow to what could otherwise be a seemingly complex Bill of Materials structure.</p>
Enquiries and Reporting	<p>Empower managers and planners to make fully informed decisions with the wide range of flexible enquiries and reports.</p>
Control Resource and Labour Costs	<p>Control labour and other resource costs by means of a straightforward mechanism.</p>

## 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	<p>Determine exactly what and when materials are required to produce the most timely and competitively priced products and services.</p> <p>Use multiple runs to simulate 'what-if' scenarios for evaluating alternative operating strategies.</p>
MRP Generation Options	<p>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).</p>
Inventory Management	<p>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.</p>
'Trees' and Critical Items	<p>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.</p> <p>Flag an item as critical to focus the production plan on just this item and observe the effect of change.</p>
Production Planning	<p>Slash productivity wastage with the intuitive visual planning board and reports.</p>
Action Messages	<p>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.</p>
Not Just for Manufacturing	<p>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.</p>

# 9 Manufacturing

## 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	<p>Make accurate future sales forecasts based on historical data using mathematical modelling (linear or curve fitting) of sales history.</p> <p>Automatically generate forecasts as far out as you require.</p> <p>Sales per item reports, based on sales history, arm you with the information to generate recommendations for manufacturing and sales projections.</p>
Fine-tune with Manual Adjustments	<p>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.</p> <p>Provide for flexible modelling to do 'what-if' forecasting.</p>
Feed into MRP Process	<p>Minimise the costs associated with stored inventory by using multiple forecasts from Greentree's MRP module to calculate the material requirements.</p>

## 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	<p>Slash production time and error rates with the straightforward Factory Order initiation with all options automatically selected.</p> <p>Make manual adjustments to the Factory Order during production to reflect the actual production picture, not just what was planned.</p> <p>Choose whether to auto-issue on commit or back-flush materials for the production run to take charge of your variances.</p>
Manufacturing Planning Board	<p>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®.</p> <p>Optimise productivity by fine-tuning production right down to minutes within each hour.</p> <p>Get the very latest picture as the Factory Order situation is updated live to the Planning Board as new orders are created and receipted.</p>
Manufacturing Variance Reporting	<p>Hone your future planning with the facility to identify the differences between the Bill of Materials' standards and actual usage.</p>

## 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	<p>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.</p>
Track and Traceability	<p>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.</p>
Compliance with Standards	<p>Pre-define standards in your classifications and ensure that faulty goods are never released.</p>
Workload View	<p>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.</p>
Environmental and Asset Testing	<p>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.</p>

10

Retail Point  
of Sale

# 10 Retail Point of Sale

Many distribution and service businesses include a retail operation as part of their sales channel.

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.

# 11

## Customer Relationship Management



# 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	<p>Manage all your relationships from one system.</p> <p>Capture and organise all your business and contact information.</p> <p>Use automatically generated organisation charts to visually present organisation structures.</p>
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	<p>Manage the entire sales life cycle from first contact right through to invoicing.</p> <p>Drive the performance of your sales team using methodical, user-defined action plans.</p> <p>Identify and action opportunities to improve revenue through tracking buyer behaviour and trends.</p>
Marketing Campaigns	<p>Dramatically improve your marketing results using highly targeted lists.</p> <p>Simplify the effort involved using built-in email, telephone, mail-out and event management tools.</p> <p>Enhance campaign effectiveness with automated response management.</p> <p>Set and measure campaign goals to control costs and results.</p>

### 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.

## 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	<p>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).</p> <p>Keep your eye on the full picture with the reporting tools.</p>
Attendee Management	<p>Quickly and easily create targeted invitation lists with the range of filtering and selection tools available.</p> <p>Drastically improve attendee communications with built-in email and mail merge actions.</p>
Financial Management	<p>Ensure your event co-ordinator uses the financial summary to be in full control of the event's financial position.</p> <p>Dramatically reduce administrative overhead and co-ordinate collections with direct integration between invoicing and accounts receivable.</p>

## Fundraising

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

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

# 11 Customer Relationship Management

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

## eCRM

Provide web access for an unlimited number of users, customers or suppliers who need to access and manage customer relationship data with Greentree's eCRM module, ideal for geographically dispersed organisations.

Included	How does it make a difference?
Self-service for Suppliers and Customers	<p>Drastically reduce administration costs by giving customers and suppliers secure access to view and manage their own accounts.</p> <p>Empower users to access their own records, e.g. account status, leads, quotes, communications, follow-ups, service requests and calls.</p> <p>Lift sales performance by extensively using eCRM within Account Management and Sales teams.</p>

12

Service  
& Asset  
Management

# 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.

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

## 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	<p>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.</p> <p>Remember that multiple locations are not an issue; assets can be defined with details of the relevant maintenance contract specified per location.</p> <p>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.</p>
Scheduled Maintenance	<p>Control what inventory can be issued/used on each piece of equipment.</p> <p>Minimise equipment downtime through predicative and well-planned schedule servicing.</p>
Track All Asset Events	<p>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.</p> <p>Identify problematic trends and quickly eradicate root causes of unscheduled downtime.</p>
Fixed Assets*	<p>Easily link assets to the Fixed Assets Register for financial management, e.g. depreciation.</p>

# 12 Service & Asset Management

## eService

Give your customers access to the self-service information systems they expect and help them stay informed, able to make better decisions 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	<p>Give customers, resellers and staff the ability to raise and track service requests resulting in better communication and faster issue resolution.</p> <p>Establish a single point of reference through the unlimited ability to attach documentation to any record.</p>
Rapid Implementation	<p>Get started quickly with eService; designed for rapid implementation into almost any service-based organisation with a wide range of built-in functions.</p> <p>Use the system to leverage off the core Greentree functions, making roll-out a breeze.</p>
Access to Knowledge Base	<p>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.</p>
Live Update	<p>Have information presented on live workflow desktops giving instant visibility of service calls and greatly improving issue resolution times.</p>

# 13

Human  
Resource  
& Payroll

# 13 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.

\* 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.

# 13 Human Resource & Payroll

## 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	<p>Give staff and management confidence in the review process by automatic scheduling of regular reviews.</p> <p>Allow for easy access to relevant information such as Key Performance Indicators and previous reviews.</p> <p>Make use of improved processes around staff reviews to increase job satisfaction which can translate to better retention rates.</p>

## 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	<p>Enable staff to view and request leave by date, type and reason.</p> <p>Empower managers to review, approve or reject leave requests with full access to all details and entitlements.</p> <p>Document and communicate approvals (and rejections) by email in real-time to ensure clarity.</p>
Leave Reporting	Tailor the built-in reporting capabilities to ensure the exact information needs of the organisation can be met.
Forecasting**	Enable managers to forecast what leave their staff will accrue up to any date in the future using Greentree's innovative workflow designer and leave-planning board.

## Occupational Health and 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	<p>Input and store all necessary workplace incident information to ensure complete records.</p> <p>Easily tailor reports to view single or multiple incidents for analysis.</p> <p>Attach documents and files in any format so that all details are stored in the one easy-to-access location.</p>
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	<p>Easily access a one-stop summary of leave balance and history.</p> <p>Allow staff to submit leave requests from anywhere and to receive an immediate email advising them of approval or otherwise.</p>
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.



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