



**INVENTORY MANAGEMENT** SALES & DELIVERY  
PURCHASING SUPPLY CHAIN EDI

**Greentree**



Supply Chain & Distribution



## Inventory Management

Many businesses struggle to make accurate inventory forecasts, often resulting in excess inventory or running out of goods. These mismatches between plan and reality can be costly and severely impact on customer service.

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**Our inventory management is more efficient now; in fact within six months Greentree has helped to halve the number of stock take variances we encountered previously.**

Victor Yukich, Managing Director, Eurotec Instruments

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### Key Benefits

- ✓ Full integration – high visibility
- ✓ eBusiness enabled to empower users
- ✓ Mobility enabled – future proof your business
- ✓ Effective warehouse management
- ✓ Easy barcode label management
- ✓ Improve relationships with suppliers and customers

### Is your business providing excellent customer service while maintaining minimum inventory levels?

Holding too much inventory puts a significant strain on warehouse space and cost management, affecting bottom-line profits. Holding too little could result in delayed deliveries and compromised customer service. With its instant access to detailed information, advanced forecasting functionality and automatic bin replenishment feature, Greentree's Inventory module will help you make warehouse management a lean, streamlined operation.

### Is your warehouse tying up funds that could be put to better use elsewhere?

Not knowing exactly what it costs to maintain a certain level of inventory could make your warehouse a cost centre, losing money for your business every month. Greentree Inventory automatically reconciles your inventory ledger with the General Ledger, as an integral part of transaction processing, ensuring the two are always correct and in balance. Inventory also keeps track of any variations between standard costs and actual costs, giving you all the information you need to create realistic and accurate standard costs.

### Have you ever lost a major sale because you didn't have accurate information at hand?

No business wants unhappy customers. An unstructured warehouse, combined with inaccurate information, will not only waste valuable time for your staff, it will also lead to delayed customer deliveries and other expensive errors, such as picking the wrong items or delivering expired goods. Greentree's built-in multi-segmented location codes will help you structure your warehouse efficiently to reflect its physical layout. This ensures that the precise physical location of every single inventory item is always known. What's more, Inventory is fully integrated with all other relevant Greentree modules, allowing authorised staff to drill down and across modules to view the details they require to make fast and accurate decisions.



## Greentree Inventory Solutions

### Do you have processes in place for easy inventory item counts?

Inventory item counts can be a pain. For some businesses, semi-manual item counts is the only way to find out what the value of the inventory really is and find out if anything is missing. Avoid unpleasant surprises by knowing exactly what is in your warehouse at any time. This will help you achieve accurate forecasting based on demand history. It will help to streamline item replenishment, speed up put-away and picking of goods and meet increasingly tighter delivery deadlines. The Inventory module provides an extensively featured item count suite with highly flexible procedures. Set up multiple item counts based on any frequency – yearly, monthly, weekly or daily to suit your requirements. You can also make a selection of items to include in a specific item count – for example high turnover items.

### Accurate and timely Inventory counts

Greentree enables the Warehouse Manager to pro-actively manage inventory throughout the year using a predefined monitoring process. Inventory counts can take place periodically on a regular cyclic counting basis. Management can determine a pre-approved tolerance level for variations between the actual item count and what is recorded in the system. This saves heaps of time and ensures that only significant variations are dealt with allowing the distribution centre to continue running smoothly without major disruption.

### The heart of a well-managed Supply Chain

Greentree's Inventory modules deal to the challenge of pressured operational environments by meeting demanding lead times while maintaining optimal inventory levels. Every level of employee has relevant Inventory information visibility and is effectively empowered to make the right decisions.

Greentree's Inventory Management module will help you achieve and maintain a competitive edge by enabling you to accurately forecast inventory requirements – no crystalball gazing just sound business decision making. Being able to make accurate decisions, at the right time on optimal levels of inventory, translates into reduced management costs and capital investment.

Your finance people will be delighted by the reduction in Inventory management costs whilst your sales people will never lose a sale due to items being unavailable, being empowered to satisfy customer demand and raise the bar on customer service levels from request through to delivery.

Purchasing and logistics departments will thrive, with Greentree Inventory Management providing confidence in the execution of the supply process. Inventory levels can be maintained on a 'just-in-time' basis rather than 'just-in-case', so you're only paying to hold the inventory you need.

### Full integration – high visibility

Inventory is fully integrated with all other relevant Greentree modules, including General Ledger, Accounts Receivable, Sales and Purchase Orders, Manufacturing, Job Costing, SCM Requisitions, Inventory Sourcing & Analytics, Accounts Payable, WebStore and WebView.

You can drill down and across modules to view details by date or demand history; totals by item or location; or view balances for multiple periods – a must for any manager for real-time planning.

- ✓ Eliminate manual processes across multiple systems and spreadsheets
- ✓ Significantly reduce data entry time
- ✓ Improve information flows



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This is a fantastic tool which we use primarily for sales reporting but it's so much more than just a reporting tool. For example, we use it for tracking our customer communication performance and various inventory applications. By tracking, monitoring and reporting various sales related activities, management has a much clearer overall picture of exactly what's going on.

Simon Vale, General Manager, Vynco Industries

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## Powerful Inventory Analysis

Using a powerful search engine, generate reusable criteria selection templates to pro-actively identify and analyse the performance of user-defined groups of inventory items. Employing flexible selection tools including product categories and Greentree's unique "trees" facility, analyse the results at a summary or transaction level. Regular analysis and decision making on particular inventory groups ensures that only the most optimum levels of inventory are maintained at all times.

## Simple and accurate forecasting

Effective forecasting is dependent upon the best available information, including sales, purchase commitments and expected deliveries. Maintaining optimal inventory levels throughout ensures an accurate information flow from one distribution or manufacturing process to the next. Managers have at their fingertips the information required to accurately plan the materials and resources required to meet the most rigorous customer demands at the most competitive and profitable price.

## eBusiness enabled to empower users

Inventory is fully integrated with Greentree's eBusiness suite, enabling remote offices or travelling executives to securely access the complete functionality of Greentree Inventory online, including requisitions, approvals and accepting sales over the internet via Greentree's WebStore. WebView allows suppliers to view information that is relevant to them from your system. For example, suppliers can view inventory levels to see if you are running low on something, while customers can check if you have specific items available and item pricing.

- ✓ Easy entry from website
- ✓ 24/7 access increases productivity
- ✓ Increased customer satisfaction – eRequisitions and WebStore opens up the supply chain and empowers customers and staff to make proactive decisions
- ✓ Improve inventory levels – with WebView suppliers are able to check the availability of goods in your warehouse, you will never run out
- ✓ Check on item availability and pricing from anywhere at any time

## Mobility enabled – enhance business productivity

No matter what products you sell, Greentree's Mobile applications are fully integrated to provide your warehouse, customer service and sales staff all the tools they need to efficiently pick and count inventory accurately, answer customer queries on the spot, raise sales orders and quotations immediately and sharpen your inventory management processes to save time and money.

- ✓ Designed to get up and running rapidly
- ✓ Eliminate keying errors transcribing from paper
- ✓ Barcode scanning ensures product picked and packed right every time
- ✓ Accurate and timely inventory counts
- ✓ Increase staff productivity resulting in more orders processed per day
- ✓ Increase customer satisfaction through fast accurate delivery of goods
- ✓ Increase process efficiency
- ✓ Optimise inventory levels
- ✓ Eliminate paper and ink



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For the first time in Stahmann Farms history, our Quality Control process has been integrated with Inventory Management making it an entirely embedded process. Inventory Management now has new discipline around it together with high visibility of exactly what's going on.

John Howard, Finance & Administration Manager, Stahmann Farms

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## Effective warehouse management

Optimise the efficiency of your warehouse. Greentree's Warehouse Bin Management organises inventory items in a logical and effective manner within your warehouse.

- ✓ Automatic bin replenishment ensures that inventory items are always in the right place at the right time
- ✓ Warehouse bin management enables you to organise bin locations and define bin types, storage profiles and capacity limits
- ✓ Quick and efficient 'put-away' and order picking based on Inventory's intelligent decisions
- ✓ Optimal use of storage
- ✓ Location codes reflect the physical layout of your warehouse, down to individual bins within rows and columns
- ✓ Quicker, stress-free inventory item counts

## Easy barcode label management

Take your business to the next level with mobile barcode scanners. The barcode labelling feature allows you to assign and print labels for warehouse items (at both bin location and item level) as well as retail pricing labels by request, or directly on inventory receipt.

- ✓ Quickly locate inventory
- ✓ Ensure cost-effective and accurate inventory management
- ✓ Streamline point of sales processes

## Improve relationships with suppliers and customers

Stay in control with the serial/lot tracking feature, which easily tracks the progress of individual items from supplier purchase through to customer sale.

- ✓ Maintain supplier and customer warranties on individual items
- ✓ Improve relationships with your customers and suppliers by pro-actively maintaining key information on items
- Reduce time, cost and complexity by managing items with serial or lot numbers
- ✓ Further boost efficiency with Dimension Tracking – maintain and track multiple balances at a user-defined level, such as colour and size of t-shirts, cans of paint or length of timber



## Key Features

Greentree Inventory is a complete inventory suite that gives you total control over quantity, cost, pricing, location, purchasing and distribution of goods. As a result, your managers can use this data to make faster and more informed decisions. Inventory includes the following key features:

### Multi-Locations

Pick from and transfer items between multiple locations.

### Warehouse Bin Management

The system makes intelligent decisions as to where goods are to be placed and picked from the warehouse.

### Volume/Unit Conversions

Maintain purchase and selling unit prices against the unit of measure relevant to the customer or supplier.

### Serial/Lot Tracking

Allocate and track perishable goods and record supplier and customer warranty details.

### Kitsets

Create a 'parent' item made up of multiple components, adjust inventory levels automatically and manage the parent item at the summary or transactional level.

### Inventory counts

Pro-actively manage inventory throughout the year periodically or on a regular cyclic counting basis. Determine tolerance levels for variations between actual item count and recorded quantity to save time and focus on significant variations.

### Reordering and Replenishment

Informed and timely product reorder decisions based on recent demand and demand forecasts.

### Advanced Pricing

Pick any price in any currency, add your margin, factor in quantity breaks, deduct a discount and calculate it all on the fly.

### Supercessions

Enables new models to be linked to obsolete or replaced items and inherit balances and open orders.

### Transaction Analysis

Define your own transaction level analysis trees and easily record and track data from the initial transaction through to your General Ledger.

### Dimension Tracking

Maintain and track multiple balances at a specific dimensional level beneath the parent, such as colour, size, units or length.

### Quality Control

Automate quality control processes for batch or lot controlled items and define 'non-inventory' items and their associated tests.

### MRP (Materials Requirement Planning)

Uses statistical formulae to predict sales and provide a forecast based on multiple variables, such as upcoming promotions or seasonal downturns.

### Mobility

Extend business productivity of your warehouse and sales operation with Greentree mobile.



## Case Study

### Lecky's Electrical & Data

#### Challenge

After opening five new branches, Melbourne-based electrical component wholesaler, Lecky's Electrical and Data, experienced some growth pains. The company had been using Greentree's character-based system CBA 2000 for eleven years, and it had served the company well, but with close to 40 concurrent users accessing the Financials and Distribution functions, stability began to suffer.

#### Solution

Greentree was a clear choice for Lecky's, says the company. Lecky's was able to isolate a vast number of areas where the system had an edge, ranging from simplicity and speed of day-to-day data entry, to advanced features such as the native integration to Microsoft Office Excel® for reporting and analysis.

#### Results

In addition to the reporting and analysis tools, the standout benefits of Greentree include the ability to take inventory counts at any time and at any branch, according to Lecky's. The time to enter inventory counts has been reduced by 90%. One critical success factor was also staff buy-in. Lecky's Greentree system continues to expand and is now accessed by 48 users concurrently.



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