

# Greentree

BUSINESS-BUILDING SOLUTIONS

*"very, very, responsive!"*



## Greentree International

Greentree International specialises in developing effective financial and business management software for medium-sized enterprises. For over 20 years our products have successfully enhanced the operations of more than 10,000 organisations. Our widespread dedicated Greentree Business Partner Network is always available to assist our customers with their requirements.

## The Greentree Product

Greentree delivers an on-line, real-time business solution, with all business functions totally integrated. Greentree also integrates seamlessly with common desktop tools such as Word, Excel, Outlook and Crystal Reports to provide for business reporting, budget modelling, transaction entry and document management, as well as mail merge and email. Along with its partners, Greentree provides business-building software and implementation services to help customers with rapid, low-cost, low-risk deployment and ongoing support.

## The Greentree Difference

Greentree will streamline your internal processes resulting in increased productivity across all areas of your organisation. It is designed to adapt to your changing needs and grow with you into the future. While Greentree's main users are medium-sized enterprises, the software is also successfully used by many smaller and larger organisations. The Greentree product is suitable for a range of business sizes, from a small team right up to one hundred users or more. It is suited to a broad range of industries and organisation types, and includes customisation options that take into account unique business and individual user requirements. The core components are highly flexible and designed to be used within any industry.

## Greentree Customer Satisfaction

Greentree has demonstrated its breadth and depth of functionality across a range of industry sectors in the Asia/Pacific region, Europe and North America providing a powerful yet simple, easily customised, extremely cost-effective business system that is flexible enough to grow with you. Greentree is well matched for a variety of business conditions and has been successfully applied to both commercial businesses and nonprofit organisations throughout the above regions. Our customers often tell us it is just the solution for their business-building aspirations.



# A MODULAR SOLUTION

Greentree is modular, so you only use the pieces that you need, thereby keeping the system relevant for your business. Within the suites of Financials, Distribution, Job Costing, Supply Chain Management, Manufacturing, Human Resources, Customer Relationship Management (CRM), Service & Support, Asset Management and eBusiness are a wide variety of modules and sub-modules that afford options rarely found in other packages.

“ Our selection committee chose Greentree in front of all of the ‘big names’ in financial software. Greentree stood head and shoulders above the competing products in the key areas of data-entry time, reporting power and ease of use. We initially projected a three year payback period; however, as we uncover more of Greentree’s capabilities, the reality has become half that time.

Larry Hammond, Accounting and Payroll Manager (Private Clients)  
Bidwells Property Consultants, part of Bidwells Property Consultants - Cambridge, UK



## Workflow

Workflow is a unique business management tool that provides a dynamic and proactive management tool for your organisation. Workflow Desktops show you precisely the information required for your role in the organisation. Financial controllers can view their key financial indicators, while service managers can view all open service requests and the amount of work allocated to their support staff. The Workflow Desktop allows users to create Favourites, bookmark regularly used records and also view visual aids such as graphical planners.

## Financial Reporting Engine in Excel

One of Greentree's key advantages is its native, live integration to Microsoft Excel. Financial reporting in Greentree is done through Excel, affording a wealth of options to financial professionals in terms of configuration and presentation of the business's reports. Financial staff can also use Excel to view Greentree data, in a totally secure environment, as well as use the tools in Excel to manipulate and transform data for analysis and budgeting purposes. And of course, users can drilldown to source documents within Greentree directly from Excel with a simple click of the mouse.

## Screen & Report Customisation

To ensure that Greentree users are comfortable with the way information is presented to them, screens and reports can be customised without programming. Changes made using the Customisation Manager are 'cosmetic' and do not affect the underlying source code in any way. When you upgrade your Greentree system, any screen customisations you have made are automatically preserved.

## Trees

Greentree allows you to create logical groups within your data, known as trees. Trees afford you powerful reporting options within Greentree. Multiple trees and branches (sub-groups) can be applied for each masterfile. A typical example would be a geographical tree for your customers that groups by State/County and City/Town. Other unique customer

trees could be industry type, employee size, or any other meaningful grouping.

Of course, trees can also be created for your suppliers, inventory items, jobs and many other data types. The true power of these trees becomes evident at reporting time when the tree structures become parameters that can be selected for generating your reports.

## eReporting

Greentree offers a cost-saving solution for the distribution of your business documentation such as invoices, purchase orders, remittances and statements. These documents can be automatically emailed, faxed or printed. eReporting allows the preferred distribution method to be predefined, making a dramatic impact on the time and resources needed to manage your business correspondence.

## Approvals & Alerts

Approvals provides a greater level of control over the Greentree system, by providing an approval process that applies to appropriate users and virtually all Greentree records. This is critical for compliance with Sarbanes Oxley. Greentree allows for a multilevel approval process, including group approvals as well as sequenced approvals. Business rules can be defined within Greentree to automatically alert users of critical information; for example, when customers are over their credit limit or purchase orders are waiting for approval. Alerts can be sent via email, pop-ups, follow-ups, SMS or other configurable mechanisms.

## Links & Attachments

Any record held within the Greentree database can be linked to another, assisting users in easily finding other information that is pertinent to the record they are viewing. Creating links is a simple process, and as each link is created, you can add relevant notes. Greentree facilitates document management by allowing unlimited external files, such as spreadsheets, scanned images, emails etc to be attached to any Greentree transaction. For example, supplier invoices or customer orders can be scanned and attached to the relevant Greentree record.

# AUTOMATED WORKFLOW

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## Business Process Manager

Consistent processes are integral to the efficient running of your business. Business Process Manager is an innovative BPM function that enables organisations to define and manage processes and thereby implement corporate policy, as they apply to business tasks. Business Process Manager allows your organisation to build and improve mission critical practices and rapidly respond to the internal and external business environment.

Business Process Manager makes it easy for you to communicate and prioritise tasks for each staff member. It provides a visual drawing tool to create business process flow diagrams that are interactive and fully integrated with every aspect of Greentree as well as Word, Excel and other external programs. It allows you to define processes including people, data, rules and events for a transparent approach to business practice so you have a platform to understand issues and resolve problems quickly, ensuring your business can deliver best practice.

## Autoscan

Greentree Autoscan provides for the electronic storage of documentation such as accounts payable invoices, proof of deliveries, customer orders, staff resumes etc, fully crossed referenced to the relevant database record. Autoscan can

deliver your business vital productivity advantages with an automated approach to document archive and distribution.

Autoscan allows you to reduce the hidden costs of paper-based document storage and ensures vital documentation is stored in a secure environment. Staff can easily access and distribute source documents without searching through cumbersome paper trails improving the processing of financial records and transactions. Autoscan integrates with all Greentree modules.

## Data Import Manager

Data Import Manager for Greentree automates data file imports from non-integrated systems. The interface manager is an advanced Workflow functionality that allows users to schedule regular imports of both masterfiles and transactions including invoices, orders, receipts and journals as well as a myriad of master record types. The format of the imported data file can be configured within Greentree thereby eliminating program changes providing a flexible platform rather than a rigid, fixed format.

Data Import Manager for Greentree allows you to manage the integration of data into Greentree with a number of powerful tools to maintain, schedule and view the data transfer process effortlessly.



## General Ledger

General Ledger has all of the accounting features you would expect from a leading-edge software package. You can set up a chart of accounts with multiple levels, produce an unlimited number of budgets, post transactions to future or prior periods with appropriate security control, and create recurring or external journal entries. However, where Greentree truly stands out is its native integration with Microsoft Excel. You can use Excel for all of your financial reporting, and also to develop an Executive Information System that provides live views of data within the General Ledger. Excel templates can even be used to create budgets and post journals directly into Greentree.

Greentree provides a suite of tools to enhance productivity that include automatic sharing of costs via allocation rules, inter-company journals, account reconciliations and foreign-currency support. Greentree also allows you to define security rules that govern precisely which accounts each user can access and post to.

## Accounts Payable

Control and monitor where your money is going and you can better control your business's future. Accounts Payable provides a managerial accounting tool that presents a clear picture of what is owed to suppliers and what your future cash commitments are.

Accounts Payable makes the process of paying suppliers simple. Suppliers can be located within Greentree using a number of different criteria, and data entry required is kept to a minimum, with integration to other modules such as Purchase Orders, General Ledger and Cash Management, mitigating the risk of errors or duplication. Invoices can be automatically routed through multiple approval levels and recurring invoices can be defined so that no manual intervention is required. If your business trades with offshore organisations, the Foreign Currency module allows you to make payments in other currencies and also calculates the currency gains and losses.

## 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 expectations in this regard, providing a range of tools to manage your customers and their accounts.

Some of the productivity features in Accounts Receivable include parent/child account structures, sending statements via email and fax as well as optional customer self-service over the Internet. Greentree's exceptionally strong security lets you not only secure the business functions a user can access, but also limit the specific data as well, such as securing individual customer accounts.

## 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. Bank reconciliations can be processed in the traditional way with matching via the printed bank statement, or it can be fully automated with downloads from your bank, and automatic creation of entries in Greentree for bank fees and other charges. Foreign currency bank accounts are supported when that option is selected.

## Debt Collection

Debt Collection operates in conjunction with Accounts Receivable and manages the collection of overdue accounts by allowing you to track customer communications and agreements made and be prompted with follow-up actions required. It automatically generates call lists using a range of parameters like amount outstanding, length of time overdue and how long since the customer has been called about the account.



# DISTRIBUTION

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## Inventory

Greentree allows you to comprehensively manage and plan inventory purchasing, pricing and storage. The Inventory module's long list of capabilities includes the ability to define an unlimited number of prices per item, select from a range of costing methods, capture multiple units of measure, manage warehouse holdings and track serial and/or lot numbers.

Reporting power is a key component of any inventory-management package, as it is critical in maintaining optimised stocking levels. Greentree uses a unique concept of user-defined 'trees', which are logical groupings of items that provide greater insight and allow you to analyse and extensively report on inventory.

Greentree also offers a range of tools to streamline stocktakes to assist in minimising stock losses and variances. When you consider the wide array of other powerful tools in Greentree, such as an unlimited number of alternate codes, bar codes, substitute items, supercessions and kitsets, Greentree is clearly head and shoulders above other mid-market systems.

*“ We looked for a system that would take us forward and support our growth. Greentree provides the latest technology available and the platform to develop our business over the next 5-10 years.  
Victor Yukich, Managing Director  
Eurotec Instruments*

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## Sales Orders

Critical to any sales-focused business is a streamlined sales process. Greentree's Sales Order module is highly configurable and tightly integrated with Accounts Receivable, Inventory and CRM, to allow the business to maintain high customer-satisfaction levels as well as accurate and efficient sales processing. Sales Orders can also integrate with Factory Orders and Purchase Orders to automatically order goods to supply specific sales orders, or to pre-allocate goods prior to their arrival.

Greentree has all the normal features expected, such as multiple delivery addresses, credit checking, back order management and unlimited selling prices. Greentree provides many advanced features rarely found in competing packages, such as consolidation of sales orders onto one packing slip or invoice, online order history of past orders and prices, standing and template orders etc. Security is also of vital importance, and accordingly Greentree allows users to design detailed security profiles for Sales Order operators, including minimum gross margins.

## Purchase Orders

Purchase Orders forms an integral part of the overall data flow through Greentree with integration points not only in the Distribution suite, but also with Accounts Payable, General Ledger, Fixed Assets, Service & Support and Job Costing.

Greentree has a number of management controls that assist in making sure expenditures are managed and authorised. For importers, Greentree has a fully integrated landed cost module that calculates the true cost of inventory, including freight and duty, to ensure both profitability and stock valuations are accurate and include the full costs.

## Quality Control

Quality Control will help you automate the quality control processes for a wide variety of tests including environmental or laboratory metrics, against both inventory and non-inventory related items. Each test is designed to describe the test measure being assessed and these tests are assigned to a test classification as a means to logically group, view and perform

related tests. You can define as few or as many tests for each item. Once tests have been conducted results can be assigned to a serialised, lot or batch tracked inventory item and their progress can be automatically tracked through the quality control process.

Classification	Test	Specification	Result	Passed	Analyst	Date	Notes
Monitors	Heat	1 hour heat test, less than 50 degrees celsius	Ranged from ambient to 45 max	<input checked="" type="checkbox"/>	Malcolm Smith	27/7/2007	
Monitors	Pixel	Check white screen for burnt out pixels	All functioning	<input checked="" type="checkbox"/>	Malcolm Smith	27/7/2007	

## JOB COSTING

Job Costing provides the financial solution for organisations that are project- or job-focused. One of Job Costing's key features is the flexibility available when building a job's hierarchy as Greentree allows for an unlimited number of jobs and sub-job levels. Hierarchies can be built according to the specific requirements of the job, or based on user-defined templates. These hierarchies allow for intricate financial and/or operational analysis and reporting, from the global job level down to the individual activities that make up each of the tasks and phases.

Another strength of Job Costing is the options it offers in relation to invoicing. Greentree provides unlimited price books in Job Costing to allow you to control how costs are marked up for billing and minimise the requirement for user input.

Job costs can be based on fixed prices, or time and materials, and can come from timesheets, inventory, employee expenses, subcontractors, purchase orders or accounts payable.

“ Greentree will give us the ability to add value to our business, control our job cost and improve the way we do business over the long term, but also with some quick short term gains.

John Todd, Chief Executive Officer  
Armflame Pty Ltd

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# MANUFACTURING

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Businesses that manufacture can utilise the extensive suite of tools available within Greentree to manage their material costs, production plans and profit margins. Greentree's Manufacturing functionality manages the issue of raw materials and finished-goods receipts and allows you to track the progress of factory orders in real time.

The Manufacturing modules integrate with both the Financial and Distribution suites to facilitate better production planning. Greentree automatically updates inventory on hand, product costs and General Ledger balances as factory orders are issued, receipted or adjusted.

A range of reports is also available in the Manufacturing suite, providing you with detailed, timely information in relation to raw material usage, work-in-progress cost analysis and cost variances for completed goods.



## Bill of Materials

The Bill of Materials module allows you to define exactly what and how many parts, components or materials are required to complete a production run. A critical component of the manufacturing process, Bill of Materials provides instructions on what to use, how long it will take, and how much it will cost in order to produce your product. Optionally it has an interdependent relationship with Materials Requirement Planning and Forecasting modules.

## Materials Requirements Planning

Materials Requirements Planning (MRP) is a process that references several key business activities as well as information across your business including all levels in the Bill of Materials, sales forecasts, sales orders and inventory. You can determine exactly what and when materials are required, in order to produce the most timely and competitively priced products and services for customers.

This module stands alone or can be integrated with Bill of Materials and Forecasting and its simple configuration and easy set-up makes it ideal for the distribution businesses to provide accurate planning of inventory purchasing requirements.

## Forecasting

The Forecasting module uses historical sales data, mathematical calculations and human intuition to forecast future inventory requirements and allows adjustments for seasonal fluctuations, thus ensuring that forecasting matches the natural curve of your business demand. You can make manual adjustments for unusual events or unseasonal demand so you're always on-track. This is an easy to manage process, as once you have established your criteria the forecast is automatically generated for you.

Forecasting can be used to feed into the MRP module's processes, providing a base to build the material requirements planning on.

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# SUPPLY CHAIN MANAGEMENT

## Requisitions

The Requisitions module is the core of the Greentree procurement process. A requisition represents a request for goods or services from within your organisation. With your procurement processes being managed by Greentree, you can tightly monitor and control spending.

Centralised purchasing processes can lead to significant cost reductions in the procurement process. Purchasing can consolidate orders across branches, affording greater flexibility to meet minimum order quantities, receive volume discounts and reduce transport costs.

The approval of requisitions can be configured to suit your business's requirements. Each user can be allocated varying levels of authority to approve or reject requisitions, or even to approve specific line item types. Users can also be given authority to approve or reject based on a maximum or minimum value of a requisition.

The Requisitions module captures a wide array of data, such as the required date, priority, location, branch, preferred supplier and delivery/contact information, which ensures that staff members can specify precisely what is required in the requisition.

## Analytics

Analytics contributes to the supply-chain process by providing a powerful reporting tool that enables users to easily generate complex sales analysis breakdowns, using an extensive range of filters. Analytics can report by stock item, customer or sales representative, which can then be filtered by branch, user-defined analysis trees or stock category. Multiple performance measures can also be chosen such as sales, cost, profit or quantity. Analytics data can also be exported for further multi-dimensional analysis using OLAP tools.

## Inventory Sourcing

Often fulfilment of a requisition requires more than just purchasing. It may involve allocating inventory to a job or creating an inter-warehouse transfer as well as a purchase order, or a combination of all three, to fulfil a requirement. Sourcing is used to analyse all requisitions, provide suggestions as to the most appropriate method to fulfil the need and generate the necessary transactions.

## Catalogues

For purchasing goods and services for consumption within your organisation, an unlimited number of catalogues can be created or automatically uploaded from your suppliers, for things like office supplies, machinery parts or virtually any goods or services you acquire. In addition, catalogues can be linked to your inventory, so you can look up the entire range of items from your suppliers even though they are not currently in your inventory system.

“ We weren't surprised that Greentree gave us rock-solid functionality across our entire business. What was truly impressive was the system's flexibility in allowing us to achieve a 95% fit before we even considered any customisation. No other package could compete with that.

Justin Morton, Managing Director

Kit Industrial - Dublin, Republic of Ireland

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**Greentree**  
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# CUSTOMER RELATIONSHIP MANAGEMENT

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## Contacts & Relationships

Greentree's CRM allows you to capture and manage the relationships you have with your customers, suppliers and other organisations. Hierarchies, teams and workgroups within these organisations can also be recorded and represented visually using automatically generated organisation charts. CRM is comprehensively integrated to the wider Greentree system, ensuring that data integrity is maintained at all times; it is also integrated with Microsoft Office and other mainstream email systems for integrated communication and mail merging.

## Sales & Marketing

Greentree's Sales & Marketing module manages your business's opportunities, leads, prospects and pipeline, along with providing a suite of tools to launch marketing campaigns and monitor their effectiveness. Sales & Marketing is fully integrated in real time, without duplication of data. For example, when a quote is converted to a sale, the transaction is automatically reflected in the relevant Financial and Distribution modules.

In addition to the sophisticated quoting capability, Greentree records all communications during the sales cycle and provides automated follow-ups to ensure sales success is maximised. Professional quality quotes can be directly prepared from Greentree using either Word or Excel templates, providing a high degree of formatting and presentation capabilities.



// *Greentree is streamlining our service provision so we can provide a better service to our clients, as well as saving time and money. We are now able to coordinate our services by seeing what technicians are doing and allocate the right qualified technician to the right job.*  
*Jacqui Bensemann, Managing Director*  
*The Argus Group - Auckland, New Zealand* //

## Customer Service & Support

Greentree helps you maintain high customer-satisfaction levels by effectively managing your interaction in a support or service environment. As calls are received, Customer Support routes the issue to the appropriate consultant/technician. Greentree maintains a detailed chronology of the call for current and future reference.

Field Service is managed through an interactive visual planner, showing each service-person's daily schedule, as well as an overall plan of all resources with graphical drag-and-drop features to make service planning a breeze. Customer Support can also be used to manage contracts and service-level agreements.

With full integration to the rest of Greentree, costing and billing of service work becomes a natural part of the service and support within Greentree.

## Knowledge Base

Knowledge Base manages documents, libraries and archives of all types. Access to information can be easily limited to particular users or groups, and a search engine helps to quickly locate the desired information.

## Event Management

When organising an event, Greentree can handle all aspects from invitations to accepting bookings, sending confirmations, seating or room allocations and invoicing when appropriate. Whether it be a marketing golf day, a seminar or training course, Greentree's unique integrated Event Management module has all your event requirements covered.

## Bookings Management

If you need to manage booking of human or physical resources, Greentree's Bookings module provides a management and planning solution that will ensure double bookings are managed while maximising resource capacity and revenue. The integrated booking planner is a visual, calendar-style representation of your organisation's current and future bookings. The planner has full drag-and-drop functionality, making it simple to use for any operator.

Integrated into the bookings system is a flexible billing structure that allows daily, weekly or monthly rates to be defined. Invoices can be raised automatically, either for the entire booking or on a progressive basis. Quotes can be automatically created for tentative bookings and contract documentation can be produced directly from the booking.

## Asset Management

Asset Management helps you to track the location and service of assets, whether they are within your own organisation or owned by your customers. Greentree provides the tools required to facilitate efficient day-to-day management of the assets in your register. Scheduled maintenance programs can be established for fully automated plant maintenance or service intervals. Maintenance can be scheduled by time or by usage such as hours, meter readings or mileage, etc.

As expected, Asset Management is integrated with Greentree Fixed Assets for depreciation purposes, or to other modules such as Sales Orders, Service & Support or Inventory.

## Fixed Assets

Not only does Greentree depreciate your assets automatically, but it posts the cost directly to the general ledger on a monthly basis, to ensure your financial reporting is accurate and up to date. With its tight integration between modules, Greentree allows you to raise purchase orders and post payables invoices directly to the asset ledger, to remove any double handling.

Advanced features allow for revaluations, differential depreciation between tax and accounting, and automatic calculation of profit or loss on disposal of assets. Existing assets can have additional capital expenditure capitalised directly to the asset, either as an increase in cost of the prime asset, or as an independent yet related sub-asset.



# HUMAN RESOURCE MANAGEMENT

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## Payroll for Greentree

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

Greentree uses predefined contracts and templates to cut down payroll processing time. Contracts save time by setting up standardised classifications and rates of pay that can be applied to multiple employees. Templates are simple to create and can be used to automatically calculate deductions and contributions and other repetitive items.

Payroll information is one of the most sensitive sets of data and access to this information must be strictly controlled. Greentree's security structure is straightforward to administer, yet extremely intricate, affording you absolute confidence in the protection of the payroll database. Not only can you set the security access to various payroll screens, but you can also set security down to individual employee data, with the settings being respected in all reports, enquiries and maintenance screens.

## HRM for Greentree

Your Human Resources department will benefit greatly from Greentree's HR management tools. HRM for Greentree provides the opportunity to build a comprehensive employee database with the analysis and reporting tools to effectively monitor the capabilities and plan the allocation of human resources.

HRM keeps a complete history of each employee's tenure, recording their training, skills and certifications as well as their involvement in committees, grievances, disciplinary actions etc. Greentree's document-management capabilities are also utilised to allow HRM to attach all relevant paperwork to the employee's record.

*“ It used to take four people three days to process payroll using our old system, plus three days afterwards to process allocations and then another week to manually enter invoices. Greentree is a big improvement, reducing the processing time to just two days for two people. Mark Donnelly, Personnel & Finance Manager CBS South - Hobart, Australia ”*

# HUMAN RESOURCE MANAGEMENT

## Occupational Health & Safety

By using Occupational Health & Safety (OH&S), you can manage workplace hazards and when incidents do occur, ensure the details are accurately recorded and the correct procedures are followed to resolve any arising issues.

Greentree's OH&S comprehensive incident recording ensures your organisation's register of OH&S events are complete, including staff involved, nature of hazard, reporting, compliance and rehabilitation measures taken.

From saving potential injury to staff, to cost and efficiency implications and government compliance, your company can improve its Occupational Health and Safety record significantly with effective management of this critical business activity.

## Leave Planning

Greentree's Leave Planning allows administrators the automated tools to manage the organisation's leave register and give employees access to their leave accruals, requests and approvals electronically.

Leave Planning is a paperless solution to the time-consuming, leave administration process that assists employees and management to maintain accurate and timely leave information.

Staff can quickly benefit from this user-friendly interface to request the various types of leave available. Leave Planning automates the process so employees can be informed of Leave Request Approval or Cancellation via email and review the status of their request at any stage.

## Recruitment

The Recruitment for Greentree module manages the process of attracting, assessing and recruiting the best talent available, allowing you to maintain your competitive edge. Recruitment is tightly integrated to other Greentree modules meaning data need only be entered once and the integrity of that data is maintained across the entire system.

Greentree's Recruitment module is an effective solution for internal recruitment processes or for specialist recruitment agencies.

## Employee Development

Employee Development automates the management process for staff reviews and maintains vital information on staff training, succession and remuneration, to assist your organisation to develop your human capital.

Now your HR administration can concentrate on strategic staff development with Greentree's Employee Development module. Employee Development is an intelligent HR tool to simplify the process of employee review by scheduling and administering appraisals automatically.

## eHR

eHR is an employee self-service kiosk that allows staff to access and maintain their personal records in Greentree HRM via the internet. eHR frees up your company's HR resources, reducing the number of requests by employees and empowering staff by putting their personal information at their fingertips.

eHR integrates seamlessly with HRM giving authorised staff access to real-time staff records and updates. Employees can update their personal records, check annual leave, pay information and access company policy and procedures securely - anytime, anywhere.

eHR lets staff and HR managers deal with routine HR requests expediently allowing management to focus on the bigger picture.



## WebStore

Exposing your sales department to the Internet can provide increased sales, dramatic cost savings, reduced telephone inquiries and increased efficiencies in managing orders. Greentree's WebStore module provides a flexible and secure solution that allows your customers to browse an on-screen product catalogue, place orders, access their account, check on stock availability and pricing details, plus access a whole range of product or other information you may provide.

The full online catalogue is a live, up-to-the-second representation of your Greentree Inventory. Because WebStore is linked directly to the database, new stock items that are introduced can automatically appear in the WebStore catalogue. WebStore can be configured to ensure Customers can see the number of items on hand and their specific customer pricing, enabling them to order accordingly and helping to maintain high satisfaction levels. Customers can view their order's progress through shipping and look up their own history.

## eCRM

eCRM provides the tools to comprehensively manage your CRM information via the Internet. eCRM allows users to create and maintain details for your customers, suppliers and prospects, as well as monitoring tasks for follow ups. Users can also look up all details on a customer's account, such as open orders, unpaid balances and past invoice and payment history. By using eCRM, each employee can ensure that all contact records remain up to date, even when they are working away from the office. As an option, eCRM can allow your customers and suppliers self-service to their own information, thereby reducing the routine questions that accounts departments need to field each day.

## eService

eService brings Greentree's Customer Support modules to the web. This portal gives customers the opportunity to log in securely to the Greentree database via an Internet browser and log a support call. Within eService, your customers can also search an on-line knowledge base to find a solution to their issue, without the need to connect with a service representative, making eService a truly self-serve solution. Each support call logged is



tracked so the customer and service representative can view what has transpired and see the call's current status.

## eTimesheets

Businesses that use time and expense sheets can use eTimesheets to overcome the inevitable problem of delayed submission, caused by geographic dispersion or employees working 'on-site'. eTimesheets allows employees to record and submit their time and expenses using an Internet browser. Furthermore, managers who are away from the office can also approve time and expense sheets, minimising the risk of billing delays.

## eRequisitions

eRequisitions allows you to roll out Greentree Supply Chain Management functionality organisation-wide, without users needing to directly access the accounting system. eRequisitions links directly to the Greentree database and contains all of the features required to submit a requisition, including inventory search capability, approve requisitions when appropriate and to monitor the status of requisitions.

## Made in JADE

Greentree is built using JADE, an advanced technology platform purpose-built for the development and deployment of large transaction-processing software systems. JADE has an integrated application-development environment, its own language, an object manager and a high-performance, object-oriented database.

JADE is produced by Jade Software Corporation, an organisation involved in cutting-edge software research and development since 1978. The Jade organisation was built on the success of their LINC product, which was adopted by UNISYS for mainframe software development and has been used by more than 4,000 large-scale sites. The fifth-generation technology, JADE, was launched by Jade Software Corporation in 1996.

## Robust Technology

The JADE platform is highly robust, a result of a single technology across all layers from the GUI to the database, which removes any technology seams – making applications stronger and totally integrated.



“ The move to JADE on an open platform has taken us from a limited position, in terms of IT, to one of real flexibility and scope. The new system supports our business processes rather than dictating them. It also puts us on a platform that can provide solutions to meet the needs of our customers faster, easier and more cost effectively.”

David Cutter, Operations Director  
Skipton Building Society - London, UK



## Thin Client Architecture

Typically, most products with the functional capacity of Greentree use FAT client technology, a legacy of the early 1990s' client/server designs. Greentree's JADE architecture is based on the thin client model, which operates far more efficiently.

## High Performance Database

For resilience, the single technology is powered by an industrial-strength database. The JADE database is a high-performance, transaction-based object database with a native Synchronised Database Service. This feature provides a configurable 'hot standby' capability for disaster-recovery requirements, as well as providing facilities to enhance performance and scalability.

The JADE platform is designed for mission-critical requirements. It has full rollback or crash recovery and archival recovery that allows technicians to roll forward through database journals for point-in-time recovery. JADE is a fully self-contained technology that has its own database-management tools included. The cost of these tools and the software licensing for the JADE database, including upgrades, is included in the price of Greentree. Therefore, the total cost of ownership is significantly lower than those systems utilising other technology.

## Capacity and Scalability

The JADE platform has the ability to manage the Greentree systems of our largest clients. Worldwide, JADE is being used by many global organisations that place significant demands on the system's capacity. These organisations include Mitsubishi Motors, World Vision, Air New Zealand and Skipton Building Society, one of the UK's largest financial lending institutions with over 1,000,000 customers.

## Education programs

JADE is currently taught in over 50 universities around the world, as it is regarded as one of the best tools to teach object concepts and the way they relate to programming and the data itself. These institutions include Monash University, The University of Western Sydney, Victoria University of Technology and York College.

JADE Website: [www.discoverjade.com](http://www.discoverjade.com)

# GREENTREE IN ACTION

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## Toyota Technical Center Australia

Greentree has been selected ahead of a number of other ERP systems to drive the operations of Toyota Technical Center Australia (TTC-AU), a cutting-edge R&D facility established by the Japanese parent, Toyota Motor Corporation. TTC-AU's business model is project-oriented, so selecting a robust and detailed job-costing system with strong integration with financials was paramount. TTC-AU also sought out a solution that opened up options for the full automation of their operations going forward. Greentree has dove-tailed with TTC-AU's requirements very nicely.

## Rock-solid financials

Greentree's Financial Management suite has allowed Accounting and Finance Manager Kim Weston to get the best out of her finance team. "We get our month-end financial reports out within five calendar days – that's very quick for us. We make really good use of the Excel Add-In (Greentree's native link to Microsoft Excel)." Operating on the Japanese financial year, TTC-AU completed their second year-end (their first with Greentree) in April 2005. "We were nervous as we implemented Greentree on 1st January, and the data for the full year was across two systems. We had some very minor issues, but they were easily resolved. Overall, it went particularly well – very smooth."



## Drilling down

The reporting options now afforded to TTC-AU are wide ranging, but Kim believes that the cost-centre reporting is where Greentree really stands out. "Using the Excel Add-In, we provide our Cost-centre Managers with an Overall Executive Report each month. These reports provide a lot of detail and give each manager a picture of their efficiency. They can control their engineers' productivity, track their timelines for each project, see the project's true cost and identify the areas where they need more control. We're very happy with the way Greentree works with Excel – it's terrific."

## Jobs, sub-jobs, sub sub-jobs...

Kim is very happy with the job costing and timesheets. "Job Costing has a great look and feel and allows us to extract the information we need to report effectively. We can break our projects down to an unlimited number of jobs and sub-jobs. Most of the other systems we reviewed only went to a single sub-job level."

The data being supplied to TTC-AU's job costing suite comes via eTimesheets, Greentree's browser-based time and expense entry application. Kim is delighted with the job costing workflow in Greentree. The timesheets have been configured to have the same style to those used in Japan, making the transition for staff easier. Kim remarks, "they are quick and very easy to use – the 'copy timesheet' function is a timesaver – and the integration between the timesheets and Job Costing is great. This is totally new for us and it's working really well."

*“ Using the Excel Add-In, we provide our Cost-centre Managers with an Overall Executive Report each month. They can control their engineers' productivity, track their timelines for each project, see the project's true cost and identify the areas where they need more control. We're very happy with the way Greentree works with Excel – it's terrific.*

*Kim Weston, Manager Accounting and Finance  
Toyota Technical Center Australia -  
Melbourne, Australia*

# Greentree

BUSINESS-BUILDING SOLUTIONS

*"very, very, responsive!"*



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