

CUSTOMER RELATIONSHIP MANAGEMENT

SALES & MARKETING
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BOOKINGS MANAGEMENT

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Key Benefits

- Organisations and relationships
- Contact information
- User defined structure
- Integration with Microsoft Outlook®
- Document management
- Teams and work groups
- Data verification
- Functional and data security
- Reporting
- Fully integrated
- Easy importing and de-duplication of data

As organisations constantly look for competitive advantages in today's rapidly changing business world, managing your customers, suppliers, sales and service processes effectively has become essential. Greentree's Customer Relationship Management (CRM) suite provides a powerful base that allows you to define the organisations your business comes into contact with, and take a holistic view of your relationship with them.

Organisations and relationships

All organisations that you deal with, including customers, suppliers, prospects or competitors, can be maintained in a single place. Organisations can have unlimited hierarchical relationships, so you can record details of branches, groups or subsidiaries together.

Horizontal relationships between organisations can also be defined, for example linking a prospect to their various professional or technical advisors record.

Contact information

In addition to the usual name, phone and address details, the reporting structure within an organisation can be defined, so that you can better understand how any one contact fits into the picture. Greentree's standard user-defined fields and trees also enable unlimited information to be captured against a contact.

User defined structure

Most information within Contacts & Relationships is user-defined, allowing the system to be tailored to your exact needs without re-programming. This can include areas such as, relationship types, industry codes, importance, classifications and etc.

Integration with Microsoft Outlook®

Contacts, tasks, appointments and follow-ups can all be published to Microsoft Outlook, providing you and your team with off-line access to key information, such as your personal contacts.

Document Management

Any type of file, including Microsoft Office Word®, Microsoft Office Excel®, pictures and graphics can be attached to an organisation or a contact.

Documents can be catalogued with summary information and stored in a tightly compressed database. These can be viewed from within Greentree and printed at any time.

“Greentree introduced us to a world we wanted to move our business to – our working environment is far less stressful and most importantly, our customers get the answers they want, instantly.”

Eric Sara, General Manager, hiPP.com.au

Teams and Work Groups

Within your organisation, logical groups of people, such as sales teams or service groups can be defined. A person can be a member of more than one group and responsibilities can be reassigned when people leave, move roles or organisational restructures occur.

Data Verification

Accuracy of data in any system can be a challenge, but Greentree's unique approach allows information to be verified systematically. You can clearly see the status of any organisation and when, and by whom, it was checked for accuracy.

Functional and Data Security

The CRM suite has been designed for use by many different staff within your organisation. Protecting the confidentiality of your sensitive data is therefore critical and a powerful data security model has been implemented to achieve this. Security can be assigned by work groups and teams, or down to an individual staff member level.

Data Management

Importing and de-duplicating of data is a simple process, with no need to store and maintain mailing lists externally. This means that your email or postal lists are always accurate and up to date, and available in CRM.

Fully Integrated

Greentree is a completely on-line, real-time integrated system. A single point of data entry updates all relevant areas instantaneously. So as prospects are turned into customers, a new customer account is created and can be maintained from Accounts Receivable or CRM.

Greentree's CRM also integrates fully with Accounts Payable, Inventory, Requisitions, Sales Orders, Job Costing and General Ledger.

Microsoft Outlook to Greentree email filing

Benefit from efficient file management and document retrieval of any email from within Greentree. This enables you to efficiently file Microsoft Outlook emails against any record in Greentree, even filing against multiple records as attachments or communications for both received and sent emails. These can be filed in Greentree as they are sent from Microsoft Outlook.

Keeping relevant emails against customers, suppliers or other key records means you have instant access when you need it, and future proofs your records for when the original email has possibly been deleted or the sender or recipient has left the company.

CASE STUDY: Leap Australasia

PROBLEM When this NZ-headquartered water systems company launched its innovative polybutylene plumbing system into the Australian market, it tapped into a potential customer base of approximately 30,000 plumbers, architects, builders and inspectors. Add to this around 7000 or so plumbers in New Zealand and you're talking about needing a Business and Customer Relationship Management system (CRM) with enough grunt to collect, record, invoice, analyse and glean business intelligence from possibly thousands of daily customer interactions.

SOLUTION Greentree's Contacts & Relationships is used by Leap to manage customer interactions with architects, builders and inspectors. Jay Wester, Managing Director, says technical staff in particular, can get the information they want as it relates to individual customers. Since Greentree's integration ensures that financial information is linked to each customer's records, everyone is accessing the same information but within their own customised unique view, so they don't need to waste time trying to figure stuff out.

OUTCOME “Greentree has future-proofed our business by providing a sound business backbone, meaning we won't need to re-jig the back-office – Greentree will scale to meet the needs of tomorrow's challenges as they happen,” Wester says.

For more information visit
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