Greentree®
PRIMED FOR BUSINESS

CUSTOMER RELATIONSHIP MANAGEMENT

BOOKINGS MANAGEMENT

SALES & MARKETING

CONTACTS & RELATIONSHIPS

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SALES & MARKETING

Key Benefits

- Sales cycle management
- Quotations
- Create invoices and accept payments with orders
- Conceptual products
- Composite products
- Marketing campaigns
- Email marketing and mail merge
- Communications management
- Outlook integration of appointments and follow-ups
- Email integration
- Action plans
- Easy data importing and de-duplication

Effectively managing your leads, prospects and customer quotes is a key part of any sales-focussed organisation. Greentree's Sales & Marketing module provides a range of tools for full sales cycle and campaign management, pipeline reporting, quote creation and automated invoice or sales order creation. With on-line access to inventory products, prices and availability, your sales staff will be able to create accurate quotes and automatically produce these using Microsoft Office Word® or Microsoft Office Excel®.

Sales cycle management

The Greentree Sales & Marketing module allows you to manage the entire sales life cycle, from the initial enquiry through to a completed order. Key information can optionally be captured about competitors, key players and the prospect's business issues and needs, to help you build a more complete picture.

Each prospect can be allocated to a sales person, plus a sales team and manager or even a reseller. Leads can be automatically assigned based on sales territories, customer account managers or product lines. Win/Loss analysis is captured and confidence ratings are recorded for accurate pipeline forecasting.

Quotations

Quotations can be attached to a sales lead, or directly against a contact or organisation. As quotes are revised, a full audit trail of all revisions is maintained, and a quote can be locked when actually sent to a prospect or customer.

This ensures that an accurate record of each quote that has been issued by your company is retained.Presentation quality quotes can be generated and directly printed from within the Sales & Marketing module, using dynamic integration to either Microsoft Officce Word or Miscrosoft Office Excel and using a template relevant to the organisation being targeted. Naturally, full on-line access to the Greentree Inventory system provides details of stock availability and the pricing matrix relevant to the prospect.

Create invoices and accept payments with orders

When a quotation is accepted, a sales order or invoice can be created from the quote, complete with real-time stock allocation, back ordering and multi-location stock fulfilment. Credit checking is applied and payments can be directly processed (including credit cards) with the order, either for deposits or full payment.

Conceptual products

Conceptual products can be used to attach a value to a prospect, without needing to specify the actual stock or detail lines. These can be used to assist the management of the sales cycle, particularly when you are unsure exactly which inventory items a prospect may require.

As the lead progresses to a quote, the conceptual items may then be changed into actual inventory lines.

Composite products

In addition to accessing Greentree Inventory and non-stock items, composite products can be defined within the Sales & Marketing module. These can be made up of a number of different lines, creating a multi-product promotion. These products can be priced based on the sum of the items they contain, or at a special defined price for the promotional item.

Data management

For mailouts, Greentree CRM facilitates the easy importing and de-duplicating of data. There is no need to store and maintain mailing lists externally. It means that your email or postal lists are always accurate and up to date, and available in CRM.

Marketing campaigns

Prospect lists can be developed using various selection criteria, including geography, demographics and buying patterns. Budgeted sales, gross profit and costs can be established with real-time reporting of actuals, pipelines and costs against budget.

Activities for a campaign can be defined and tracked, and may include items such as mailers, telemarketing, faxes and emails.

Email marketing and mail merge

Once a prospect or customer list has been created, Greentree can generate bulk or one-off emails to all the list members. A record of each email sent is retained, keeping a valuable history of your communications with your customers and prospects.

Mailing labels can be produced, including full postal distribution centre sorting. Mail merge processing for in-house production, or via external mail houses, are both supported.

Communications management

Keeping a record of both inbound and outbound communications is vital. Greentree's Sales & Marketing module not only allows you to record communications, but also highlights incomplete or 'open' communications for systematic follow-up and management.

You can cross reference your communications to sales leads, quotes, organisations and contacts, giving full visibility of interactions at any level.

Microsoft Office Outlook® integration of appointments and follow-ups

Greentree's Sales & Marketing module can make appointments and follow-ups, and has its own reminder engine, ensuring your staff are pro-actively kept advised. In addition, appointments, tasks, contacts and follow-ups can be published to Microsoft Outlook.

Email integration

Greentree can use Microsoft Outlook for emails or directly communicate with your SMTP mail server, providing seamless email integration to most email platforms available.

Action plans

Creating action plans can allow your sales team to follow a methodical approach. Key milestones can be planned and acknowledged as each one is achieved. Template action plans can be set-up, and multiple templates can be applied to a sales lead, to allow complex and co-ordinated approaches to a given prospect.

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 been deleted or the sender or recipient has left the company.

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