GREENTREE4

NEVER STAND STILL

NEW CAPABILITIES

SCREEN DESIGNER

ENTERPRISE SEARCH

WORKSPACE

GREENTREE4SALES

SEARCH

ENTERPRISE

GREENTREE4SALES

FORMS

FLEXI-

FLEXI-FORMS

WORKSPACE

SCREEN DESIGNER

Greentree®

PRIMED FOR BUSINESS

Key Benefits

- Works on desktop, laptop or tablet
- User-friendly workspace
- Comprehensive functionality
- Simple display of key data
- Tailored to the way you work
- Information anytime, anywhere.

GREENTREE4SALES | BUSINESS ON THE GO

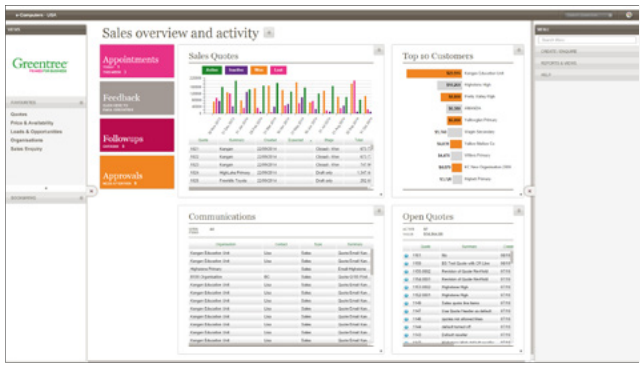
Sales used to be simple. We want to make it simple again. For too long sales teams have been cut off from core business systems; if they do have access it's via an online app, which is like sucking information through a straw. In comparison, we're connecting your revenue generation engine to your business engine in the most powerful way possible; anytime/anywhere access to an engaging user experience that has been designed specifically for those in a sales role.

Check out how Greentree4Sales will work for you.
http://youtu.be/EUkXX_pNXeo

Greentree4Sales is revolutionary. Imagine harnessing the functionality and information of Greentree4 and being able to access it seamlessly from your tablet or laptop on the fly, tailored to the way you work. Look up a customer; find out all the information you have on them in a few taps. Create a quote; track it through the warehouse and despatch. Check if it's been invoiced. See who has and hasn't paid you. When a customer calls, check if what they want is in stock and the available alternatives. See who you're scheduled to visit that day and anyone you need to chase. And you still haven't left the car. With Greentree4Sales you can keep on the move - your business system now travels effortlessly with you from desktop to tablet (or laptop) and back again.

Workspace

Everything in Greentree4Sales has been tailored with the active salesperson in mind. We've configured the Workspace to work the way you do, reflecting key data you need to keep at hand. Choose to present the information as a badge or load into the Views Tray to keep in constant view (check out the Workspace video for more on this). The badges highlight key facts such as overdue tasks and alerts across a comprehensive range of intelligence.



Know what's happening in a glance: Workspace showing badges and four open panels.

Currently featured in Workspace:

Open Quotes	Sort by date or status the quotes you currently have open. Select to reveal and update individual quotes in an instant.
Sales Quotes	Overview of active and inactive quotes plus those that you have won or lost. Presented as a summary graph with a detailed, scrollable list underneath.
Top 10 Customers	An organisation-wide view that displays your top 10 customers and their revenue.
Follow-ups	Listed in date order all of the follow-ups you have scheduled or been assigned. A red dot indicates if the task is overdue.
Appointments	See your day's schedule at a glance. Tap to shift to the next, day, month or year.
Approvals	This is one for managers. Highlights quotes or any other task requiring sign-off. Select the asterisk to approve on the spot or drill down for more information.

Organisations

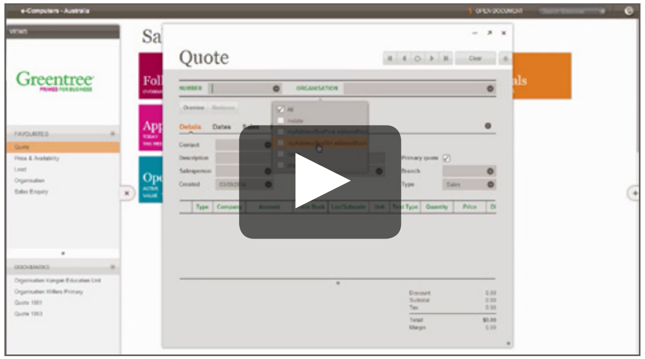
Check out everything you've ever needed to know about an organisation from one simple screen and, using Screen Designer, you can even configure this to your specific needs. As an "organisation" represents more than just a customer, if you have access to suppliers, resellers and prospects, this is where you'll find their information too.

The organisation form is linked to Google Maps so you can match an address to a location in an instant. Any related financial information is summarised, with the ability to drill down into detail plus be alerted to issues such as late payments. The Sales View link similarly gives an overview of all open orders for the organisation (not just those driven by quotes) and can deliver the detail of their progress including pack, despatch and billing. In The Zone for this form you can make quick notes, view alerts and make any approvals required.

Quote Form

It may have a deceptively simple facade, but Greentree4's quote form technology is impressive. When creating a new quote you get to experience the full force of Greentree4's Flexi-Forms technology - at every step of the process you're prompted for information with Pop-ups and consolidated fields to make data entry easy. Fields within the form are also powered by Enterprise Search, so if you're not sure of the product name you're after, enter a close guess and the options start appearing. Select the product name and a full description and photos will appear alongside – so you know you've got it right. And as this is in real time, its status and availability will be 100% accurate – no more unfulfilled orders. Once you've completed the form, head for the Smart Button to email or print your quote – job done.

With an existing quote, open the Quote Form and an alert will appear, top left, if there is an issue with the account. The Smart Button at the top right detects you're in Quotes and will give you the option of copying or revising the quote you're in. The Revisions tab reveals a full quote history, with notes and links to any related quotes that have been converted or abandoned. You can immediately start making changes from a real point of knowledge.



See how a quote is created in more detail.
http://youtu.be/56ATreoXO0o

"Our progress has been fantastic, and Greentree has been a major part of that success. It's stood the test of the company growing tenfold and it's still working admirably today."

Simon Challies, Chief Financial Officer, Ryman Healthcare

Price and Availability

The Price and Availability screen details how much you charge for a certain product and what its availability is. Linked to customers, the pricing section does the thinking for you. It immediately picks up on any discounts awarded to a customer and calculates them against your enquiry – with adjustments for quantity breaks if required. Because you now have real-time access to the main database, you can check on the spot how many items are in stock, how many are actually available for sale and where they are located. The 'related inventory' tab details not only recommended product substitutions but details accessories or add-ons to the sale – the smart pricing takes into account the number of items you have already selected and calculates any applicable discounts.

Sales View

This is your one-stop shop for an overview of the entire sales process. This is a screen that's not just for the sales team. Anyone with an interest in the organisation's sales performance or those in a sales support role will relish this complete picture of sales activity - the extent of what you can see will depend on your user permissions. Tab across quotes, orders, packing slips and invoices to get a real-time snapshot of the status of any sale whether it has come in from your sales channel, your own sales team, as a phone order or via the internet. If a customer calls wanting to know where their order is at and everyone is at morning tea, you'll be able to give them an answer. Simply tap or click to drill down into any of the information presented.

Leads and opportunities

Most sales teams live and die by their pipeline. This screen gives you a great overview of all the live leads and opportunities assigned to you, highlighting action that needs to be taken and giving instant access to an identified opportunity should the prospect call. If they're ready to convert, simply select the line where the lead appears, then head to The Zone at the top of the screen. In The Zone you can convert it to a quote with one tap or click and email it straight to the prospect - it is automatically included in the Open Quotes and Sales Quotes panels on your workspace.

More to come

Greentree4Sales is going to grow rapidly; new functionality will continue to be added. Make sure you get on board at the start of the journey to make full use of what we have now – and what there is to come including:

- Extending user access to a greater range of information relating to suppliers, activities etc
- Enabling users to update or create information for suppliers and customers on the fly (if they have authorisation to do so)
- Providing greater ability to manage teams; this includes seeing what sales staff are engaged with and making alterations where necessary
- Enhanced functionality around leads and opportunities to better manage the company sales pipeline.

YOU MAY ALSO BE INTERESTED IN:

- Screen Designer
- Workspace
- Enterprise Search
- Flexi-Forms
- Customer Relationship Management
- Mobile Solutions

PREROGATIVE
Greentree ERP System Specialists

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