

eHR
eREQUISITIONS
EDI
eREPORTING
eTIMESHEETS
eAPPROVALS
eSERVICE
WEBSTORE
eCRM
WEBVIEW

Key Benefits

- Contact management tools
- Extensive data capture
- Search tools
- Daily summary
- Related items summary
- Account views
- Customer & Supplier self-service
- Secured data
- Leading-edge technology

Organisations wanting to access and manage customer relationship data over the Web can use Greentree's eCRM module, which provides access to an unlimited number of Greentree users, or your customers and suppliers, via an Internet browser. eCRM is an ideal solution for geographically dispersed organisations that are committed to maintaining the highest level of data integrity in their CRM system.

Contact management tools

Provide the ability to add, define and maintain contacts in the Greentree CRM database from your browser. Each record can be defined as either an 'organisation' or a 'contact', and the relationships between each can be documented. Inter-relationships can also be defined between organisations, such as parent companies, and between contacts, such as manager/sub-ordinate. In fact, complete organisational hierarchies can be captured using eCRM.

Extensive data capture

Users of eCRM will be able to input all of the necessary information to create a complete snapshot of each organisation or contact. These details may include status, addresses, phone numbers, relationships to other contacts or organisations, credit information and many more. This information is laid out in logical groupings, making each record simple to navigate.



“Greentree’s integration and specifically, our use of CRM as our information hub and single data entry point, has effectively automated workflows from end-to-end with significant savings in time and costs – we now spend time managing the possibilities Greentree has created for us.”

Mark Murphy, Finance Director, Gerard Murphy Plumbing

Search tools

Finding an organisation or contact within eCRM is made easy by the search and filter capabilities in the system. Users can search for contacts using any text in tandem with a number of filters that include names, phone numbers, email addresses, relationship type, status and more.

Daily summary

Each time a user logs into eCRM, they are presented with their daily summary. The daily summary sets out tasks for that day, and those that are upcoming. Show or hide all the tasks within a particular category. When the expanded view is shown, drill down through each line to view the item in more detail. The tasks that can be shown in the daily summary include appointments, follow-ups, communications, leads, quotes, calls and service requests, or your own custom data or web links.

Create quotations

Travelling sales representatives can enter and modify quotations whenever they are using eCRM.

Related items summary

For each contact or organisation, a user can view a list of all of the associated items that are linked to the record in question. Related items may include leads, quotes, communications, follow-ups, service requests and calls. The related items can be sorted by any column heading, and can be drilled into to retrieve the complete, original record.

Account views

eCRM draws on the data contained in Greentree CRM and also the Accounts Payable and Accounts Receivable modules to build a view of the customer or suppliers account status. This information included in the account summary covers AR or AP invoices, sales orders or purchase orders that are associated with the customer or supplier. Drill down to original records and also generate a customisable aging analysis.

Customer & Supplier self-service

eCRM also facilitates self service for your suppliers and customers. Each can login securely, and view their account status, current invoices, payments and orders, which eases the burden on administrative staff.

Secured data

Given that eCRM is a portal to Greentree CRM, all existing security restrictions in place are respected when accessing the data via eCRM. Essentially, each user has exactly the same rights and privileges to records whether they are using CRM or eCRM.

Leading-edge technology

eCRM utilises web-based protocols and a “web services” engine to manage communications between the main Greentree database and external web-based systems via a SOAP/XML transport protocol.

For more information about
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