

## INFO ACCESS AND REPORTING

**WEBVIEW**

FINANCIAL  
REPORTING ENGINE  
IN EXCEL (FREE)

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& REPORTING

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ANALYSIS  
& REPORTING

### **Greentree Solution Summary**

- Drill into your business information from anywhere
- Organisation-wide productivity improvements
- Extremely powerful information access
- Proactive partner relationships

Making the right decisions is always easier when you're in the picture. But with today's complex systems it's not always possible to give everyone who should have information easy access to the data they need. Location problems, permission issues and simply making sense of complex information can all make it difficult for users to get the full picture. And not having access to accurate and timely information can make the difference between succeeding and failing in today's challenging, fast-paced markets.

Greentree's WebView puts you in charge with a powerful and flexible browser based information publishing engine that empowers anybody with permission to access and view the information they need from within your Greentree system.



“Greentree has provided our company with a stable platform which pulls together our entire operation, so that I have complete visibility of every facet of the operation. With the click of a finger, I have complete sales analysis reports, new customer prospects, debtor, creditor and inventory information, from wherever I happen to be.”

Caroline Inge, Director, Auscos

## Missed business opportunities

The best management is proactive with managers able to identify trends, predict future workloads and plan appropriately. Without detailed information about progress to date, remote department managers may be unable to determine how they are going against budget for the month. They may believe they are on target when in fact an order or job they were expecting has not come through leaving them and the business short.

## Poor productivity

When staff, customers or suppliers don't have immediate access to up-to-date, accurate information they can be forced to waste valuable time searching out answers to queries. In a highly competitive market, business simply can't afford this kind of wasted effort.

## Bottlenecks in accessing critical information

Geographically dispersed or remote staff and stakeholders can experience bottlenecks when it comes to accessing vital reports and information. With decisions being made based on this information, it's easy to see how this can quickly lead to potentially poor decisions across the business.

## Insecure business relationships

Today's successful businesses empower their customers and suppliers to reach into their systems and participate in the management of the relationship. Without systems to enable this, customers and suppliers are held at arms length, unable to track their orders, view job status, or check inventory availability or accounts information. Worse still, it's easy for customers to migrate to a new supplier if their key criteria are better met elsewhere.

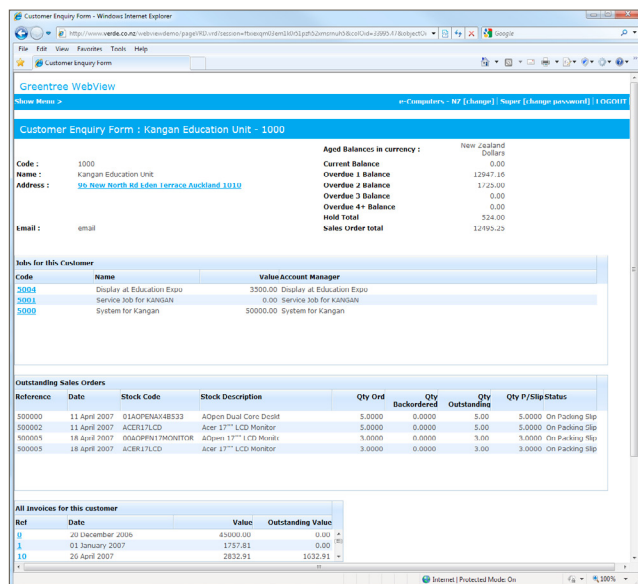
## CASE STUDY: Patton Refrigeration

Patton is a leading manufacturer and wholesaler of refrigeration, air conditioning and mechanical services products and manages some complex inventory and distribution issues. With much of the workforce being highly mobile and being available 24/7, remote accessibility to the existing Greentree system has been a key issue. In particular, staff in the field need to be able to access inventory records and to view the status of inventory and factory orders to service customer requirements.

When Greentree's WebView was released, Patton saw this as an exciting opportunity to give all staff access to view and query the valuable real-time data held within Greentree from any location via the web portal. The ability to define access rights by user means that this information is always appropriate to the user in question, a feature which creates new opportunities. “Our next step is to open the system up to customers to allow them to view their own data. This will relieve pressure on our staff by giving our customers the right to produce their own copy invoices and statements and to access their account history,” says Phil Hitchins, General Manager, New Zealand. Hitchins says he's now looking forward to the rollout of iPhones, which will improve WebView accessibility even further.

For more information visit  
[www.pattonnz.com](http://www.pattonnz.com)





From one screen you can see all the details about your customer – outstanding balances, active jobs, outstanding orders and much more. You can also reprint invoices.

## GREENTREE WEBVIEW SOLUTIONS

## Access your systems from anywhere

With Greentree's WebView, anyone you give permission to is free to get on with business - wherever they are. So long as they have access to the internet, WebView enables them to view your Greentree information on the go.

## Live information

Any information that's available in your Greentree system is simultaneously available through your WebView browser to anyone you give access to. Unlike many other web-based systems there are no scheduled updates. WebView takes you directly to accurate, up-to-date information which means you can view and manage your business information with absolute confidence.

## Organisation-wide productivity improvements

Greentree's WebView system is accessible via the Internet from anywhere and is open to anyone you grant permission to. This could include visibility of inventory levels, customer order progress, backorder status, customer balances, and financial reports. Practically any Greentree information can be published making it a very effective business intelligence tool across the organisation. Encourage communication and collaboration and reduce duplication of effort and time-wasting amongst anyone involved with your business.

## Control what you publish

Greentree's WebView comes with the built-in ability to create unlimited queries and publish them to look just how you want using a dynamic, intuitive web form designer. This gives total control over how to extract, manipulate and present the information required, to achieve powerful results without the need for costly programming or IT resources.

## Pro-active business relationships

WebView's tiered rules-based menu structure means that you can give customers and suppliers access to relevant information within your system, safe in the knowledge that they will be able to access only the information that you define as appropriate. This empowers them to engage with your business in a way that suits both of you, making it a more fulfilling and 'sticky' relationship; one that stands a greater chance of lasting the distance.

## Publish Financial Reports

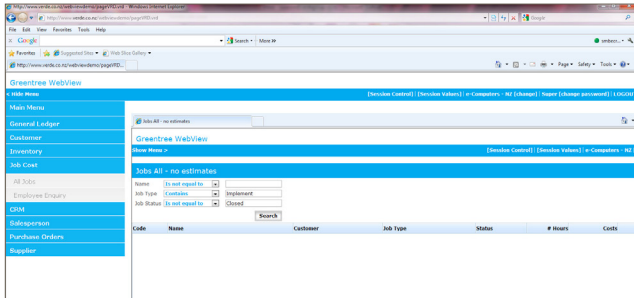
Your financial reports can be published via the web for review and action by appropriate personnel when and where they require it, for example while travelling.

## Drill down to your detail

Management isn't only about looking at the big picture. From time to time, you need to drill into the detail; transactions, expenses, orders, inventory lookups etc. Because each situation may well be unique, Greentree's WebView is designed to allow you to set your own rules about how users can explore your information.

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## Info Access & Reporting **WebView**



Each user sees a customised menu, then is able to enter their own selection criteria once they are in the query page

## KEY FEATURES

Offering web-based access to the wealth of information within the Greentree product suite, WebView also offers a range of additional functions including:

### Multiple User Access Levels

Control what each user can access through highly granular access controls.

### Universal Access

Available anywhere you have access to the internet.

### Total Visibility with Fully Tailorable Views

Enquire, report and review information through permissions based, purpose designed web forms and reports.

### Highly Flexible Search Function

You specify the criteria you want to determine the data you view.

### Intuitive Query Designer

Design your own queries using Greentree Explorer, a query tool designed for end users not technical consulting staff.

### Web Form Designer

The web form designer allows you to define views of data from many different modules.

### Tailored Menus

Each user group can have their own menu showing only the options and data available to them.

### Full Data Export Capability

Export any information that can be displayed via WebView into Microsoft Excel for further analysis.

### Rapid Deployment and Implementation

Automated, simple initial deployment followed by straightforward creation of user profiles and permissions that you control.

### View Attachments

View and print any attachments stored against business records.

### Familiar and Consistent Interface

A clear, intuitive web browser interface makes it quick and easy to train any user.

### Full integration with any Greentree information

Take advantage of the full integration with Greentree's entire business solution.

For more information about  
**Greentree & ERP Software**  
please get in touch:

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