Greentree®
PRIMED FOR BUSINESS

WORKFLOW
with 3D Live

APPROVALS
&ALERTS

BUSINESS
PROCESS
MANAGEMENT

BUSINESS
PROCESS
MANAGEMENT

AUTOSCAN

WORKFLOW
DESKTOP

AUTOSCAN

APPROVALS
&ALERTS

DATA
IMPORT
MANAGER

DATA
IMPORT
MANAGER

APPROVALS
&ALERTS

WORKFLOW
DESKTOP

Key Benefits

- Integration
- Multiple approvals
- Group approvals
- Sequential & non-sequential workflows
- Controlled authorisation
- Multi-layered rules and decision Trees
- Delegation of authority
- Scheduled & data driven rules
- Alerts
- External notifications & emails
- Instant alerts
- Security

Increase the day-to-day productivity of your business. Greentree's Approvals and Alerts can help automate the daily processes in your business using specifically designed workflow tools that allow your organisation to ensure critical transactions, documents, or records are monitored and approved through the appropriate chain of command - automatically.

The Approvals and Alerts module gives you back control of your business with a multi-level approach to ensure increased workflow efficiency and the security of valuable and sensitive business information. The rules based approach can be customised to each organisation's needs, with features allowing for individual and group approvals in both sequential and non-sequential business flows.

Integration

Greentree's Approvals and Alerts is designed to keep your organisation's business on track and reduce time costs to a minimum. Fully integrated with all modules, Approvals and Alerts supports multi-level approvals and user defined alerts for any component within the Greentree system, keeping you in complete control of the entire process. This automated cross checking function ensures your company stays on top of information discrepancies, maintaining the accuracy and integrity of crucial data.

Multiple approvals

Greentree's multiple approval approach is intelligently centred around user specified settings, with notifications appearing on selected user workstations as configured in the approval rules. New groupings and different levels of authorisation can be established or modified at anytime to ensure a quick response for approvals without compromising company procedures. The multiple approvals feature also allows for multi-routing of documents and approvals to specified personnel simultaneously.
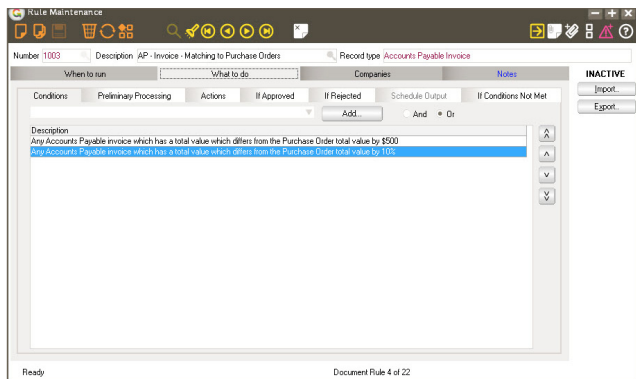
Group approvals

Group approval is the smart way to control your approval workflow by encapsulating your organisation's structure so that a document can be routed to all users within any group. The multi-group support is a further powerful feature allowing users to be in more than one group, or a document to be approved by many groups, giving greater flexibility.

> "The ability to customise an active desktop and basically, allow users to control their own workflows was a real stand-out for me – this had the effect of changing and improving the way information flows right around the business."
>
> **Bruce Rayment,** Chief Executive Officer, Alucobond Architectural

Create unlimited rules to take control

Sequential & non-sequential workflows

Sequential and non-sequential options provide approval structures that can be applied to your organisation's specific needs. With options such as approve in advance, approve previous levels and override previous rejections, sequential and non-sequential options are demand driven, delivering noticeable improvements to your business workflow.

Controlled authorisation

Greentree's Approvals and Alerts module allows for full control over the authorisation procedure. The module guarantees time efficiency and precise distribution of approval documentation and tasks in real-time. Flexible settings allow for customisation to be applied at all levels to ensure that only authorised staff have access to approvals on specific requests guaranteeing a timely and secure resolution of the approval process.

Multi-layered rules and decision Trees

Approval rules are applicable across multiple levels. Unlimited rules can be created that work through a decision tree, re-evaluating a new rule at various steps in the process. For example, a request to purchase a new computer could initially be sent to the IT department for approval. When approved by that department, the purchase order is re-evaluated as to the total value of the order and directed to the appropriate management staff based on a set of value rules.

Delegation of authority

Greentree has a flexible feature that enables staff the power to delegate their authority to other users on a need driven basis to avoid disruptions to workflow caused by staff absence.

Scheduled & data driven rules

Greentree's Approval and Alert rules can be evaluated as soon as data is entered, or on a scheduled basis, which ever is the most appropriate mechanism for your business requirements.
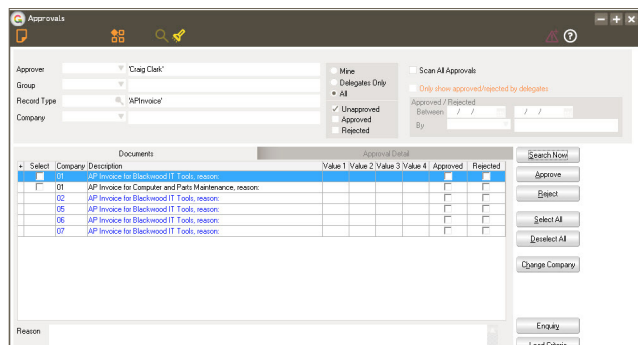
Alerts

In addition to the powerful approval process, Greentree contains a flexible alerts system, with multiple platforms for delivery of an alert via e-mail, SMS, follow-ups or PDA's. The workflow also includes a notification system that will keep a permanent record of any information or alert conditions.

External notifications & emails

Not only does Greentree's Approvals and Alerts assist internal controls, it can also be used to trigger interaction with your customers or suppliers. For example an automatic email notification can be sent to a customer advising of a delayed order delivery.

"Greentree was by far the best fit for our business, with additional features that the other options we looked into just didn't have."

Les Young, Financial Controller, Hydroflow Distributors

Approvals & Alerts deliver multi-layered flexible approval processes

Instant alerts

While the rules based Approvals and Alerts engine provides a platform to trigger events based on your own defined business rules, Greentree also has the ability to display an instant alert on any record within the system, each time it is accessed. A warning on a customer for example, may be displayed every time an order or an invoice is prepared for that customer.

Security

Greentree's Approvals and Alerts combined with Greentree's advanced security feature means only authorised staff can view and approve specified records guaranteeing the security of your business' intelligence.

The Approvals and Alerts module eliminates the need for the transfer of physical documentation from desk to desk minimising the opportunity for paperwork to become lost and sensitive information to be released to unauthorised personnel. Being fully integrated with Greentree's document management solution, the paperless office can become a reality for you with the power of Greentree.

CASE STUDY: Sun Engineering

PROBLEM Sun Engineering (QLD) Pty Ltd had an ambitious growth strategy, but its accounting system wasn't up to scratch. In an attempt to connect the stand-alone accounting system to various financial and operational systems, a multitude of Excel spreadsheets had to be created to bridge the functionality gap. This resulted in the duplication of effort and generated a mountain of paperwork as staff spent hours entering and re-entering data.

SOLUTION Greentree Workflow's Approvals and Alerts enforces a disciplined approach to purchasing. It notifies the authorised person electronically without the need to print paper documents, resulting in a 30% reduction in the company's carbon footprint. Integration and a single data entry point have enabled a level of accuracy never before seen.

OUTCOME "Without doubt, Greentree has restored managerial confidence in the reporting process," says Michael Rodwell, Business Development Manager. "This enables directors to take a strategic view of the business and make sound fiscal and operational decisions based on reliable information." In fact, the impact of a coherent decision-making process has enabled the organisation to grow from a $30 million company to a $60 million company in a few short years.

For more information visit www.suneng.com.au

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