



CUSTOMER RELATIONSHIP MANAGEMENT



CONTACTS & RELATIONSHIP

As organisations constantly look for competitive advantages in today's rapidly changing business world, managing your customers and sales processes effectively has become essential. This CRM suite provides a solution that can be easily tailored to suit most businesses, with seamless integration into the core MYOB Greentree financial and distribution modules and secure workgroup-based access to sensitive information.

KEY BENEFITS

- Organisations and relationships
- Contact information
- User defined structure
- Integration with Microsoft outlook
- Document management
- Teams and workgroups
- Data verification and data security
- Reporting
- Fully integrated
- Easy importing and de-duplication of data

ORGANISATIONS AND RELATIONSHIPS

All organisations that you deal with, including customers, suppliers, prospects or competitors, can be maintained in a single place. Organisations can have unlimited hierarchical relationships, so you can record details of branches, groups or subsidiaries together.

Horizontal relationships between organisations can also be defined, for example linking a prospect to their various professional or technical advisors record.

CONTACT INFORMATION

In addition to the usual name, phone and address details, the reporting structure within an organisation can be defined, so that you can better understand how anyone contact fits into the picture. Greentree's standard user defined fields and trees also enable unlimited information to be captured against a contact.

USER DEFINED STRUCTURE

Most information within Contacts & Relationships is userdefined, allowing the system to be tailored to your exact needs without re-programming. This can include areas such as, relationship types, industry codes, importance, classifications and etc.

INTEGRATION WITH MICROSOFT OUTLOOK®

Contacts, tasks, appointments and follow-ups can all be published to Microsoft Outlook, providing you and your team with offline access to key information, such as your personal contacts.

DOCUMENT MANAGEMENT

Any type of file, including Microsoft Office Word®, Microsoft Office Excel®, pictures and graphics can be attached to an organisation or a contact. Documents can be catalogued with summary information and stored in a tightly compressed database.

TEAMS AND WORK GROUPS

Within your organisation, logical groups of people, such as sales teams or service groups can be defined. A person can be a member of more than one group and responsibilities can be reassigned when people leave, move roles or organisational restructures occur.

DATA VERIFICATION

Accuracy of data in any system can be a challenge, but Greentree's unique approach allows information to be verified systematically. You can clearly see the status of any organisation and when, and by whom, it was checked for accuracy.

FUNCTIONAL AND DATA SECURITY

The CRM suite has been designed for use by many different staff within your organisation. Protecting the confidentiality of your sensitive data is therefore critical and a powerful data security model has been implemented to achieve this. Security can be assigned by work groups and teams, or down to an individual staff member level.

DATA MANAGEMENT

Importing and de-duplicating of data is a simple process, with no need to store and maintain mailing lists externally. This means that your email or postal lists are always accurate and up to date, and available in CRM.

REPORTING

In addition to the numerous standard reports provided, you can build new reports with the built-in report writer, or any of your favourite tools such as Microsoft Access® or Crystal®.



FULLY INTEGRATED

Greentree is a completely on-line, real-time integrated system. A single point of data entry updates all relevant areas instantaneously. So as prospects are turned into customers, a new customer account is created and can be maintained from Accounts Receivable or CRM.

Greentree's CRM also integrates fully with Accounts Payable, Inventory, Requisitions, Sales Orders, Job Costing and General Ledger.

INTEGRATION WITH MICROSOFT OUTLOOK®

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.

SALES AND MARKETING



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®.

KEY BENEFITS

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

SALES CYCLE MANAGEMENT

The Greentree Sales & Marketing module allows you to manage the entire sales lifecycle, 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 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 Office Word or Microsoft 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.

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

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.

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.