GREENTREE MOBILE SOLUTIONS **SALES**

Greentree®
BUSINESS-BUILDING SOLUTIONS

Greentree® Mobile Sales Management

Delivering customer orders rapidly and accurately, maximising sales potential from customer accounts and providing the best possible levels of customer service are goals all businesses strive to achieve. Any fall down in these areas result in customer complaints, unnecessary sales credits, extra shipping costs or lost sales, all costing your staff time and your business money.

Key Benefits

- Increase staff productivity
- Increase customer satisfaction
- Get up and running rapidly
- Easy to manage integrated solution
- Fast and accurate data capture
- Increase process efficiency
- Optimise Inventory Levels
- Reduce customer complaints
- Bar code scanning support
- Eliminate paper and ink

Your business is already running lean and delivering quality products and services with efficient processes so how can you go further and increase productivity, reduce costs, improve process efficiency and increase revenue without major effort or staff upheaval?

If your business relies on sales people working with customers then the Greentree Mobile Sales Management suite can provide the platform for your business to realise these goals with our unique suite of Mobile software. Typical benefits† reported across companies equipping sales people with mobile solutions include:

- Increased productivity and improvements in data accuracy and reporting
- Reductions in order process cycle times resulting in faster order delivery for customers
- Revenue increases from higher levels of Customer Satisfaction

Why go mobile

This convergence of mobile device proliferation, stable mobile platforms such as Windows Mobile and affordable data plans, offers a mature platform to deliver cost effective business applications. This offers mobile workers seamless access to enterprise business systems functionality and information.

Greentree has invested heavily to create a suite of applications for Windows Mobile, extending the powerful capabilities of your enterprise Greentree software beyond the office and into the field to empower sales and customer service staff.

Even if your business is running efficiently now, can you afford to miss an opportunity that can realise these benefits*?

- Eradicate high data entry error rates processing paper based order documents

"Very, very flexible!"

† IDC White Paper: Mobile Line-of-Business Applications for the Midsize Business: An ROI Analysis, June 2008

- Reduce costly customer returns and credit requests
- Remove order processing errors or delays
- Ensure the right inventory is available to fill orders immediately
- Reduce customer complaints and increase customer satisfaction

You need to consider the Greentree Mobile Sales Management software suite. Greentree Mobile currently offers suites for the three key business areas of Sales Management, Warehouse Operations and Field Service.

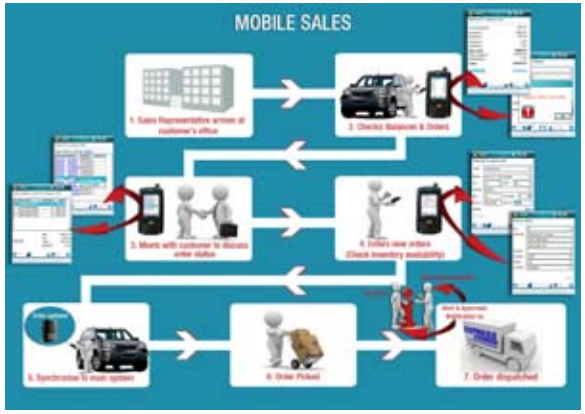
Each suite has its own set of rich functional applets and Greentree's powerful Approvals and Alerts module adds additional benefits across all suites.

Greentree Mobile Sales Management

Where ever you are, Greentree's Mobile Sales Management provides your sales and customer service staff all the tools they need to be able to answer customer queries, raise sales orders and provide quotations immediately.

Key Benefits

- Get up and running rapidly
- Increase customer satisfaction through fast accurate entry of order requirements
- Answer customer queries on the spot with immediate visibility of pricing, balances and orders
- Customer orders can be captured when you meet with them, resulting in accurate and timely Order Entry and eliminating keying errors transcribing from paper
- Increase selling opportunities with past sales information immediately on hand

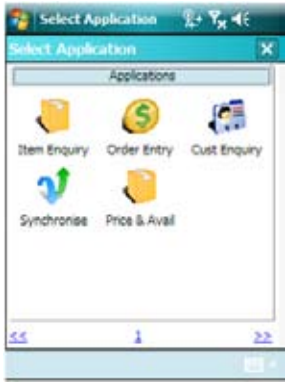


"Very, very integrated!"

- Maintain optimal inventory levels through real time visibility of order requirements
- Save money and trees by eliminating paper and ink
- Increase staff productivity resulting in more orders processed per day and increased time with customers

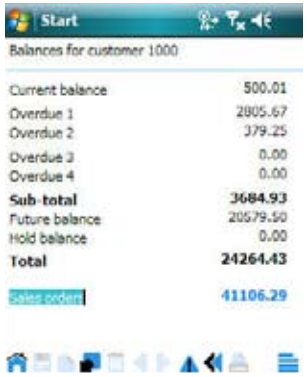
The Mobile Sales Management suite comprises the following "applets" for effective management of customer relationships and order capture in the field.

- Customer Enquiry
- Sales Order Entry
- Sales Quotations
- Item Price & Availability



Each Mobile user, or group of users, can be provided a filtered subset of the enterprise data. For example each device may provide Customer information only for a sales region of relevance to the sales representative. This ensures security of information as well as optimum efficiency of operation and data traffic, resulting in more effective use of time when with your customer. The look and feel of each applet follows a consistent, easy-to-use design with terminology chosen to be field friendly yet consistent with your Greentree enterprise application. Navigation of the Mobile application is easy with hyperlinks provided for process-related tasks and an intuitive icon-based menu across all applets.

Customer Enquiry



Where ever you are, Greentree's Mobile Sales Management provides your sales and customer service staff all the tools they need to be able to answer customer queries, raise sales orders and provide quotations on the spot. The customer's financial status is visible at a glance, and even advises if the customer has been placed on stop credit. Recent Sales Orders are also available along with their status and full details of the items, quantities and prices.

"Very, very alive!"

Sales Order Entry

When meeting with your customer you can enter their sales order on the spot with Greentree Mobile's Sales Order Entry applet. This powerful applet provides all the capabilities you require in the field. You can select the item to order by scanning its barcode, choose Unit of Measure, Price book, quantity required and, if permitted, override the price or add a discount. You can also record the customer's preferred delivery date and any extra notes required to clarify the order. If required to be delivered at a drop ship address this can be selected from predefined customer addresses or a new address entered for the order.

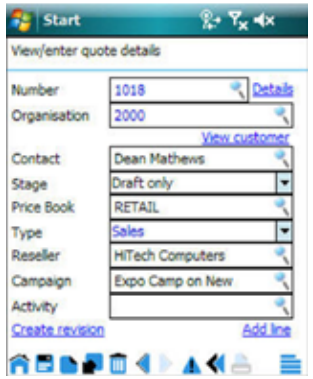
Sales Quotations

Now you can prepare quotations on the fly while discussing requirements with your customer. Once you have captured the quotation details, these will automatically create a quotation in the Greentree Sales & Marketing Module, allowing immediate visibility for Sales Management for forecasting or approval. Quote revisions can be created, ensuring the original is retained for future reference and the stage in the sales process and campaign details can also be noted.

Free format notes can be added as well as selecting the preferred delivery address for the customer. All the required information for managing quotes and sales forecasting are also available to allow these to be completed by the Salesperson and include Win Confidence percentage, expected order date, when won (or lost) and the quotation expiry date. Greentree's mobile sales quotation is a powerful sales tool to equip your sales people to capture, manage and report sales opportunities easily and immediately ensure that information is available to the business.

Price and Availability

Whenever you need to know the price of an item you can find out using the Price and Availability applet. By selecting a customer as well you receive pricing specific to the customer. By varying the criteria the price



"Very, very powerful!"

Related Modules

- Mobile Field Service
- Mobile Warehouse Operations
- Accounts Receivable
- Inventory
- Advanced Pricing
- Sales Orders
- Analytics
- Business Process Management
- Contacts & Relationships
- Sales & Marketing
- Workflow Desks
- Approvals & Alerts
- Qlikview for Greentree

provided can be calculated based on quantity breaks, currency or date, in case you have date specific special pricing promotions active. Inventory balances are provided with quantity details by a wide range of categories including on-hand, committed to Sales Order and on Order, each providing links to breakdown by inventory location.

If an item is a kitset, then its kitset components can be viewed showing the quantities available by location.

Why Greentree Mobile

The key tenet of our Greentree Mobile solution and our point of difference is our "Power of One" architecture. In designing the architecture of our mobile solution we researched limitations experienced by organisations using existing mobile applications and designed ways to overcome these, resulting in mobile software and technology offering simplicity to setup and get going, easy to use and, more importantly, simple to manage.

We call this 'The Power of One' - a unique convergence of technology, standards, functionality and deployment into a single, end-to-end solution:

- One comprehensive functionality set end-to-end
- One technology layer from server to PDA
- One deployment and update process server to PDA
- One solution provider so you can install 'out-of-the-box' with no 3rd party interfaces required

Greentree Mobile unleashes the power of your Greentree enterprise system to liberate and improve the productivity of your Salesand customer service teams.

Easy Deployment

Greentree Mobile is easy to deploy. Each device is defined in Greentree and the data filter for each user, or group of users, established if required. Once the small Greentree Mobile Connection Manager software is installed on the mobile device and launched, a connection will automatically be established and appropriate data for that user and mode of operation is downloaded, then you are up and away.

"Very, very powerful!"

"Very, very integrated!"

Greentree is modular, with all business functions totally **integrated.** This provides you with a wide variety of modules and sub-modules that afford options rarely found in other packages. You purchase the pieces that you need, effectively matching the system to fit your business. Choose from: Financials, Job Costing, Supply Chain & Distribution, Manufacturing, Human Resources, Customer Relationship Management (CRM), Service & Asset Management, Business Intelligence, Retail, Workflow-Business Process Management and eBusiness.

Greentree is a solution, readily adapting across a broad range of industries and business types. Businesses are provided with a **powerful,** extremely cost-effective system that has consistently proven itself capable of managing change and growing business potential.

With simple, smart thinking at your fingertips, Greentree provides the ultimate seamless business-building environment. Exploit its accuracy in business metrics, challenge its capability to deliver empowering information. Rely on the one highly **responsive** solution to efficiently streamline your internal processes resulting in increased manageability and productivity across all areas of your enterprise.

What's the difference to any other software solution? Greentree is the most responsive business software product available, providing a source of competitive advantage to help you drive your business to the next level!

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