

CUSTOMER RELATIONSHIP MANAGEMENT

CONTACTS & RELATIONSHIPS



Key Benefits



- Organisations and relationships
- Contact information
- User defined structure
- Integration with Microsoft Outlook®
- Document management
- Teams and work groups
- Data verification
- Functional and data security
- Reporting
- Fully integrated

Greentree® Contacts & Relationships

As organisations constantly look for competitive advantages in today's rapidly changing business world, managing your customers, suppliers, sales and service processes effectively has become essential. Greentree's Customer Relationship Management (CRM) suite provides a powerful base that allows you to define the organisations your business comes into contact with, and take a holistic view of your relationship with them.

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 any one 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 user-defined, 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 off-line access to key information, such as your personal contacts.



"Very, very responsive!"



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. These can be viewed from within Greentree and printed at any time.

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.

In addition, Greentree's powerful security system, that controls which functions and reports you can access from the menu, can be used to manage user access to various CRM functions.

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®.

"Greentree introduced us to a world we wanted to move our business to – our working environment is far less stressful and most importantly, our customers get the answers they want, instantly."

Eric Sara, General Manager - hiPP.com.au



Related Modules

- Workflow
- Asset Management
- Customer Services
- Sales & Marketing
- Bookings Management
- Knowledge Base
- Accounts Receivable
- Accounts Payable
- eCRM



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.

Microsoft Outlook to Greentree email filing

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.

Keeping relevant emails against customers, suppliers or other key records means you have instant access when you need it, and future proofs your records for when the original email has possibly been deleted or the sender or recipient has left the company.

CLIENT SPOTLIGHT: Eurotec Instruments

Established in 1985 as importer/distributor of controls and instrumentation for the HVAC, Refrigeration, and Electrical industries. Eurotec's network covers New Zealand with offices in Auckland, Wellington and Christchurch.

For more information visit: www.eurotec.co.nz



"Very, very familiar!"

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“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 **flexible** 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!

