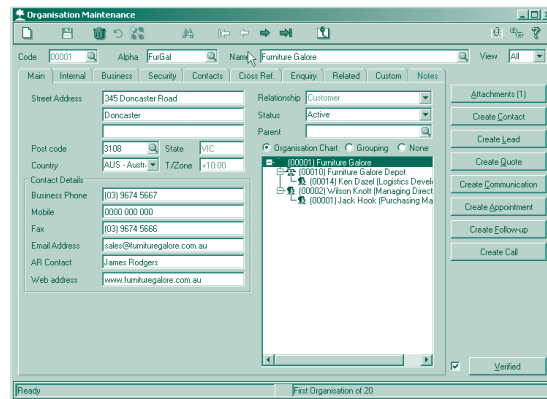


As organisations constantly look for competitive advantages in today's rapidly changing business world, managing your customers, suppliers, sales and service processes effectively has become essential. Greentree's Customer Relationship Management (CRM) suite provides a powerful base that allows you to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



## Key Benefits

### Internet Enabled

Greentree is enabled for Internet deployment, out of the box, using its thin client technology. This allows remote offices or travelling executives to obtain secure access to the complete functionality of Greentree via an Internet Service Provider.

### 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

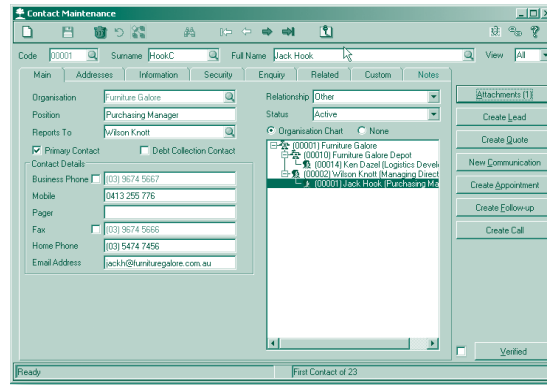
to your exact needs without re-programming. This can include areas such as, relationship types, industry codes, importance, classifications, etc.

### **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.

### **Document Management**

Any type of file, including Microsoft Word, 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 Access or Crystal.

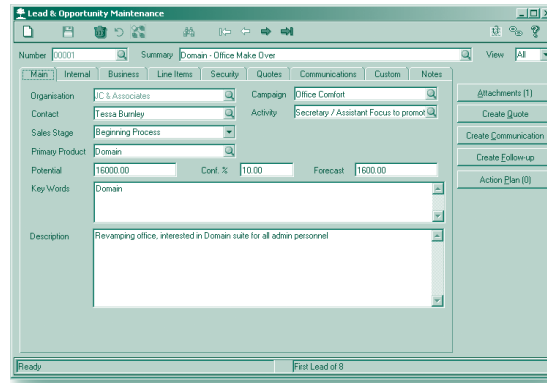
### **Fully Integrated**

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.

# Related Modules

## Sales & Marketing

This module provides a range of tools for full sales cycle management, pipeline reporting, quote creation and automated 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 them using Word or Excel. Once a sale is made, quotes can then be converted into a Greentree sales order or customer invoice.



## Knowledge Base

Managing information and making it accessible to internal staff, customers and suppliers is a challenge for all organisations. Greentree's Knowledge Base module provides a framework for systematically storing information and providing flexible yet secure access control, both internally and externally, to that information.

## Bookings Management

Greentree's Bookings Management module can be utilised for a diverse range of requirements including rentals, resource management and event management. A key part of your marketing may include the requirement to organise and manage different types of events. Bookings Management provides you with a complete solution, including invitations, confirmations, attendances, seating allocation and mail merge. This module is also well suited to 'resource booking', such as camp sites, training rooms, studios, etc.

Bookings Management has the facility to invoice attendees, making this module applicable to training courses, seminars and other revenue generating events. It can also raise periodic invoices for extended and short-term rental requirements.

## Customer Support

The Greentree Customer Support suite provides the capability to effectively manage your after sales service operations and the typical functions of a customer support "help desk" with call tracking, problem analysis and resolution timeframes. Incoming calls can be easily reassigned to the appropriate person or team by a supervisor, and tracked through to completion.

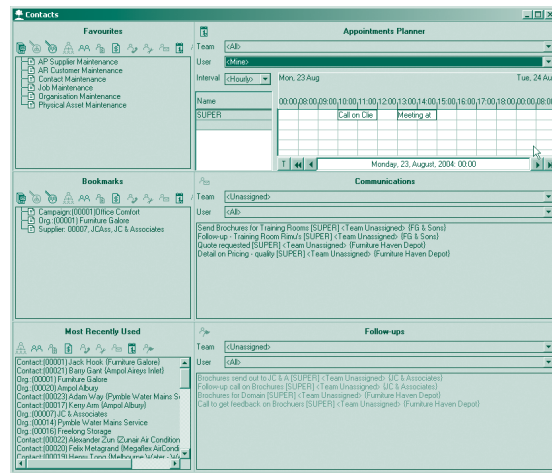
Follow-up calls or actions required can also be monitored; ensuring all outstanding customer issues are effectively resolved. Calls can be escalated to a field service team via the creation of "service requests." These requests can then be assigned to a field service person and team for action, while being monitored as part of the original call log. Management of field service personnel, assigned to carry out maintenance and repair tasks for customers, as well as cyclical and scheduled maintenance tasks, is catered for.

## Asset Management

The Asset Management suite caters for the tracking of physical assets, including those within your organisation and those that belong to your customers. External assets may include items that you have sold and are now maintaining under a warranty or service contract, as well as assets obtained from other sources. Used to track asset locations, service requests, exchanges, loans and ownership details, this module is quite separate from the Greentree "Fixed Assets" module, which calculates depreciation and related financial transactions for your own assets. The module integrates with Greentree Fixed Assets for depreciation management, Job Costing for maintenance work and Inventory for spare parts or exchanges.

## Workflow Designer

This module provides the ability to define user specific "Workflow Desktops", which include organisation and contact details, Bookmarks, Favourites and Global Attachments. Special desktop objects are available to provide immediate visibility of Appointments, an Appointment Planner, Follow-ups and Communications with organisations and contacts. These objects can then be "drilled into" for further detail and action.



Attachments can be of any file format, including Microsoft Word, Excel or Adobe PDF and linked to any contact or organisation and recalled or printed at any time.

## eService Portal

By adding the eService Portal to the Customer Support suite, customers are provided with internet based, real-time access to log their own support requests, as well as monitor the current status of calls, issues and other information.

## Contracts

The Contracts module allows specific customer maintenance contracts to be defined and managed. This includes the products they cover, the contract period, and the cost. If required, service levels can also be defined and implemented as part of this process. This allows the response and resolution times to be defined, and tracked against each support call received.

## Debt Collection

Greentree's Debt Collection module provides a structured approach to the management of your collections process. Call lists may be generated based on user definable criteria, including invoice due dates or period balances and be filtered by organisation, branch, currency, salesperson, team, calendar or payment terms.