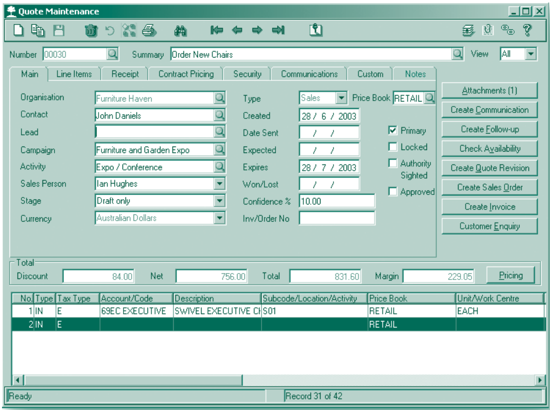
Sales & Marketing

Greentree®
BUSINESS-BUILDING SOLUTIONS
"very, very, responsive!"



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 Word or Excel.

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.

Sales Cycle Management

The Greentree Sales & Marketing module allows you to manage the entire sales life cycle, 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 more 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 Word or 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.

Conceptual Products

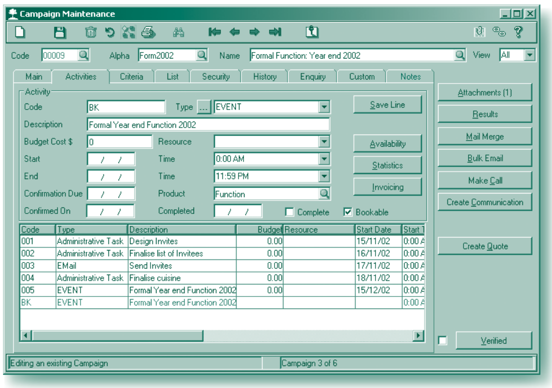
Conceptual products can be used to attach a value to a prospect, without needing to specify the actual stock or detail lines. These can be used to assist the management of the sales cycle, particularly when you are unsure exactly which inventory items a prospect may require. As the lead progresses to a quote, the conceptual items may then be changed into actual inventory lines.

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.

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.

Outlook Integration of Appointments and Follow-ups

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.

Email Integration

Greentree can use Microsoft Outlook for emails or directly communicate with your SMTP mail server, providing seamless email integration to most email platforms available.

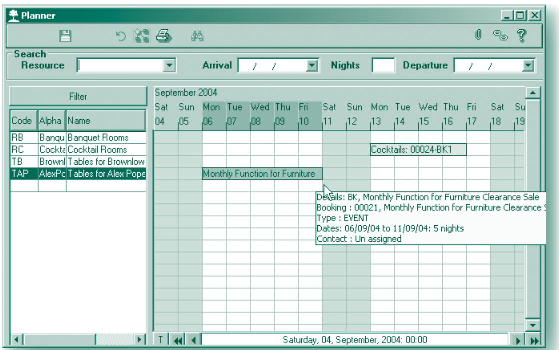
Action Plans

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.

Related Modules

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.

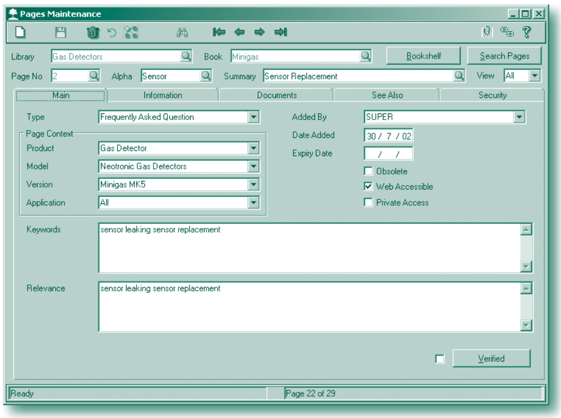
This module is also well suited to 'resource booking', such as camp sites, training rooms, studios, etc. Bookings Management has the facility to invoice attendees, making this module applicable to training courses, seminars and other revenue generating events. It can also raise periodic invoices for extended and short-term rental requirements.

Workflow Designer

The Sales & Marketing module is fully integrated with Greentree Workflow, providing comprehensive views of open or outstanding customer leads and quotes and to whom they have been assigned. With real-time access to this information, staff and management can monitor, and also easily take pro-active actions to increase sales. These views are easily customised to provide relevant information to both sales staff and sales managers instantaneously.

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.



Fund Raising

Fund Raising allows for the management of Pledges and Donations, capturing who the pledge/ donation is from, what it relates to and the amount involved. It also allows for the processing of money received. Pledges and Donations can be revised ensuring a full audit trail of all revisions is maintained. This is performed with the use of a version number, which reflects the original Pledge or Donation. There are various fields available to capture this information, as well as providing additional details for filtering of data and reporting.

Counter Sales

Counter Sales allows for the capture of items sold and receipt of payment at the point of sale. Products are identified through the use of a barcode scanner. Alternatively, you can select a product from the drop-down list of items. Payment is received and processed to the Financial modules.