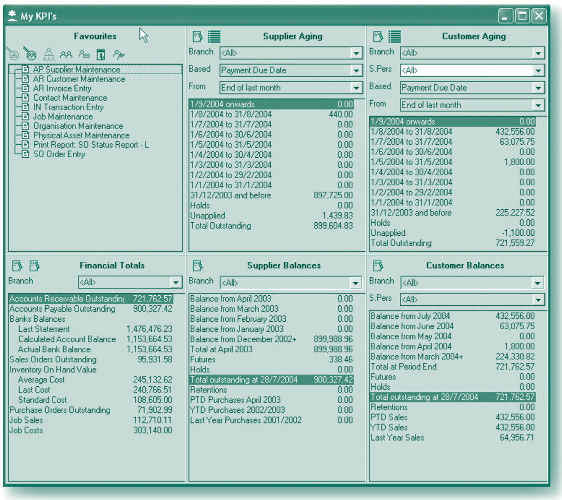
Workflow Designer

Greentree®

BUSINESS-BUILDING SOLUTIONS

"very, very, responsive!"

Now you truly can have your finger on the pulse of your business. Always having an instant snapshot of real-time key business information live at your fingertips is vital to any organisation striving for improved and streamlined business processes. The Greentree Workflow Designer module provides countless dynamic desktop views with information updated to all relevant desktops across the organisation instantaneously.



Key Benefits

Immediate Access to Key Indicators

The Workflow module allows you to create multiple "Desktop Views" that provide immediate visibility of key business information across the system. Information may be selected, rerouted and "drilled into" for immediate access to key data. Desktop views can be tailored to suit each individual user, user team or perhaps different user type. Workflow enables you to group business processes and simply build information on the fly resulting in timely access to information and elimination of many unnecessary steps.

Advanced Workflow Management

Greentree's Workflow can be used by managers or supervisors to monitor the current workload of their team members, and to allocate or re-allocate items as required. This helps to ensure that sales enquiries or support requests are correctly followed up, assigned to the appropriate resource, resolved within the required timeframe or escalated to ensure expectations can be met. The structure of the Greentree Workflow module helps management to monitor this process with a real-time, visual view available at all times. As items are completed, they are immediately removed from the "outstanding" view on all required workstations. A typical desktop view can provide immediate access to Favourites, Bookmarks, Attachments, Action Buttons and many Desktop Objects. These include:

Favourites – Shortcuts can be set up for any frequently used Greentree screens or business functions the user has access to. Upon selecting the shortcut, the required form will be immediately loaded, ready for data entry. Favourites can also be grouped or organised into Explorer style folders, if required, to support logical groups such as daily or weekly tasks.

Bookmarks – Bookmarks take the "Favourites" concept further by enabling you to create a shortcut to select records you need to access regularly. These could include particular customers, stock items or customer quotes, etc.

Attachments – Any type of file, including Microsoft Word and Excel files, pictures and graphics, can be attached to business objects, e.g. customers, inventory items and quotes, providing immediate access to key information.

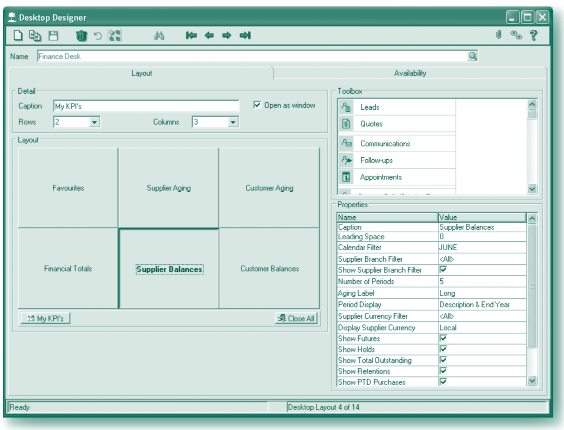
Action Buttons – Immediate actions can be executed, such as finding an organisation, opening a new service call, initiating a quote, as well as organising your Favourites or Bookmarks.

Dynamic Record Links – Any record within Greentree can be linked to one or more other records to establish logical and visible relationships. For example, a customer may have a shareholding in a supplier, so to create visibility of this relationship a link can be established, with a meaningful comment noted, between the two. In a similar fashion, a business contact at one organisation may also hold a position at another, so a link can be established between the contact and the second organisation. This can also be applied at a transactional level, with an invoice being linked to an employee who originated or perhaps approved the invoice. Enquiry and search facilities are provided to easily view these links.

Desktop Objects – Desktop Objects form the building blocks used to populate each desktop, which include a wide range of business processes, analyses or reporting objects, such as Appointments, Appointment Schedule and Planner, Communications, Follow-ups, Sales Leads, Quotes, Sales Orders, Packing Slips, Purchase Orders, Requisitions, Support/Service Calls, Service Call Schedule and Planner, Jobs and Job Totals, Bank Totals, Financial Totals, Customer ageing and balances and Supplier ageing and balances.

Workflow Desktop Designer

The Workflow Designer provides an intuitive interface, allowing you to create the appropriate desktop for each user or user team. Each panel size can be defined and a Desktop Object assigned within the panel, with a range of properties that can be set for that object, including options to view or hide selected information, as well as provide filters to allow dynamic selection of data to be viewed on the desktop.



A security function is provided, which enables you to define which users have access to each "Desktop View". Users are then able to easily select which of the available desktops they wish to access or have loaded automatically when they log into Greentree.

Desktop Examples

Desktops can be designed for common functions including, but not limited to:

Financial Desktop

A Financial desktop enables you, and your management, to see the current status of your critical financial information in one glance, such as all financial totals, total bank balance, customer and supplier ageing reports and balances. Having 'up to the minute' information on the desktop, without waiting till month-end, provides all the pivotal information in one view, allowing more informed business decisions. From this desktop you can also save time on financial reporting. You can simply launch ageing reports directly from within the financial desktop, providing immediate and current reports from which to gauge the status of your business.

Distribution Desktop

A Distribution desktop enables you to see the current status of your critical business information in one glance, such as the current inventory and all outstanding sales orders and purchase orders for immediate tracking. If using the Sales Order module, the desktop can also show the status and date of every packing slip in the system, highlighting the overdue orders and allowing you to “drill-down” to see each individual item.

Job Costing Desktop

Your desktop can display an instant view of all job costing totals providing an effective and efficient system for managing jobs and projects. Key indicators include the totals of job sales and job costs and detailed information on the labour and inventory costs based on the period to date.

Supply Chain Management Desktop

A Supply Chain Management desktop can include details of requisitions raised, outstanding purchase orders, as well as sales orders and packing slips, and for visibility of pending demand, may include active sales quotes.

Customer Relationship Management (CRM) Desktop

When using the many CRM modules, a number of specific Desktop Objects are appropriate and can be added to your desktops including open communications, sales leads, quotations, appointments, sales follow-ups and Most Recently Used functions.

Collections Desktop

This desktop will provide details of your open collection communications, collection follow-ups and open team collection communications, as well as Favourites, Bookmarks and Most Recently Used organisations and contacts.

Fund Raising Desktop

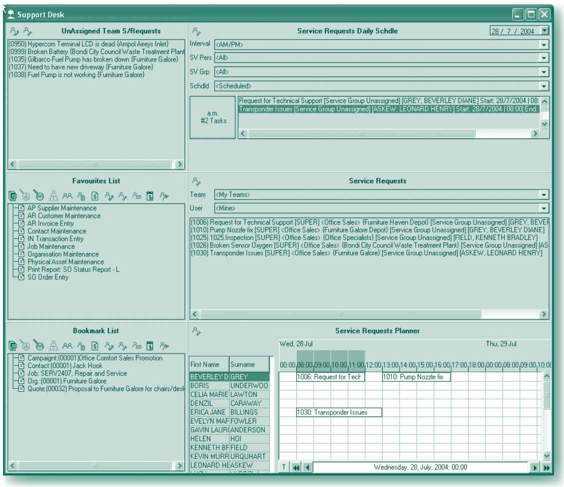
This desktop includes all pledges, open communications and follow-ups, as well as Favourites, Bookmarks and Most Recently Used organisations and contacts.

Service Request Daily Scheduler

This tool provides a planning board to detail the day's scheduled service requests by individual technician or group. This would typically be provided to each technician so they have visibility of their daily schedule for any calendar day. Service supervisors have access to all technicians' schedules with a filter to view selected technicians' workloads.

Support Calls and Service Requests Desktops

Drawing information from the CRM Support modules, a range of workflow panels may be created to show outstanding support calls for individual staff, teams or the overall company. As calls are entered into the system or updated by any user, the information is immediately updated on any relevant workflow screens across the organisation. A service manager can view all support calls or service requests by user or group and move these between technicians.



Tools that augment the support calls and service requests desktops include the service request daily scheduler tool to detail the day's scheduled service requests by individual technician or group and the service request graphical planner that provides a graphical view of all service requests across time and service technicians, with the capability to "drill into" the request for more information or to reassign/reschedule by dragging and dropping on the planning board.

Service Requests Graphical Planner

This tool provides a graphical view of all service requests across time and service technicians, with the capability to "drill into" the request for more information or to reassign/reschedule by dragging and dropping on the planning board.