

# eBUSINESS eCRM



### Key Benefits

- Contact Management Tools
- Extensive Data Capture
- Search Tools
- Daily Summary
- Related Items Summary
- Account Views
- Customer & Supplier Self Service
- Secured Data
- Leading Edge Technology



## Greentree® eCRM

Organisations wanting to access and manage customer relationship data over the Web can use Greentree's eCRM module, which provides access to an unlimited number of Greentree users, or your customers and suppliers, via an Internet browser. eCRM is an ideal solution for geographically dispersed organisations that are committed to maintaining the highest level of data integrity in their CRM system.

### Contact Management Tools

Using eCRM, every member has the ability to add, define and maintain contacts in the Greentree CRM database. Each record can be defined as either an 'organisation' or a 'contact', and the relationships between each can be documented. Inter-relationships can also be defined between organisations, such as parent companies, and between contacts, such as manager/sub-ordinate. In fact, complete organisational hierarchies can be captured using eCRM.

### Extensive Data Capture

Users of eCRM will be able to input all of the necessary information to create a complete snapshot of each organisation or contact. These details may include CRM code, status, addresses, phone numbers, relationships

to other contacts or organisations, credit information and many more. This information is laid out in logical groupings, making each record simple to navigate via the standard tabs.

### Search Tools

Finding an organisation or contact within eCRM is made easy by the search and filter capabilities in the system. Users can search for contacts using freeform strings in tandem with a number of filters that include names, phonenumber, email addresses, relationship type, status and more.

### Daily Summary

Each time a user logs into eCRM, they are presented with their daily summary. The daily summary sets out a user's



"Very, very alive!"



tasks for that day, and those that are upcoming. Users can either show or hide all the tasks within a particular category. When the expanded view is shown, users can drill down through each line to view the item in more detail. The tasks that can be shown in the daily summary include appointments, follow-ups, communications, leads, quotes, calls and service requests, or your own custom data or web links.

### **Related Items Summary**

For each contact or organisation, a user can view a list of all of the associated items that are linked to the record in question. Related items may include leads, quotes, communications, follow-ups, service requests and calls. The related items can be sorted by any column heading, and can be drilled into to retrieve the complete, original record.

### **Account Views**

eCRM draws on the data contained in Greentree CRM and also the Accounts Payable and Accounts Receivable module to build a view of the customer or suppliers account



status. This information included in the account summary covers AR and AP invoices, sales orders and purchase orders that are associated with the customer or supplier. Users can drill down to original records and also generate a customisable aging analysis.

#### Customer & Supplier Self Service

eCRM also facilitates self service for your suppliers and customers. Each one can login securely, and view their account status, current invoices, payments and orders, which eases the burden on administrative staff.

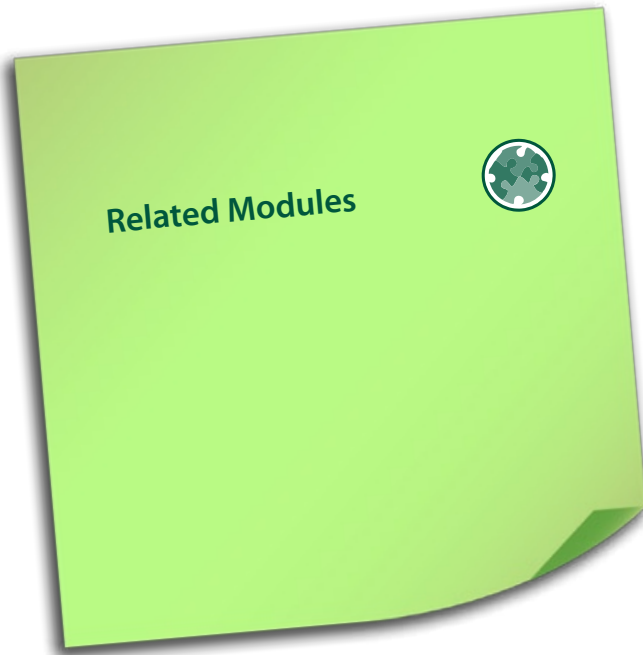
#### Secured Data

Given that eCRM is a portal to Greentree CRM, all existing security restrictions in place are respected when access-

ing the data via eCRM. Essentially, each user has exactly the same rights and privileges to records whether they are using CRM or eCRM.

#### Leading Edge Technology

eCRM utilises web-based protocols and a “web services” engine to manage communications between the main Greentree database and external web-based systems via a SOAP/XML transport protocol.



#### CLIENT SPOTLIGHT: **TECHNIKA** Technika

Technika imports and distributes around Australia high-quality home appliances from Italian manufacturers. Innovative tooling sets Technika appliances apart, while economies of scale make them affordable. The range of appliances includes ovens, patio heaters, dishwashers and rangehoods. The Victoria-based company has a wide retail partner network, as well as a nationwide service network. The company has built up a solid reputation for its appliances, and they are now often included as part of a package when builders sell new homes.

For more information visit:  
[www.technika.com.au](http://www.technika.com.au)



“Very, very responsive!”



“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 it's accuracy in business metrics, challenge it's 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!

