



Examples of Approvals & Alerts in action>>

Increase the day to day productivity of your business.

The Greentree Approvals & Alerts module empowers organisations to create their own business rules to put desired system controls in place. These rules can be applied to all areas of Greentree giving companies virtually limitless options in how processes can run and be monitored. Read below for just a few examples of how existing Greentree customers are using Approvals and Alerts to great effect.

“Workflow and Approvals and Alerts has put us in control of our business processes. Instead of reacting to situations we have enforced how and when our processes occur.”

Mike Cotton, IT Manager - Incat Tasmania



Control

Truly successful businesses promote entrepreneurial thinking but within a carefully managed environment. By using Greentree Approvals and Alerts you can help achieve this.

- With the world becoming more electronically orientated the exposure to fraud / theft is more likely to come from people within your company.

Q: Wouldn't it give you peace of mind knowing you can reduce the risk of your business systems being manipulated to aid in such behaviour?

A: With Greentree Approvals and Alerts you can create an approval process when changing employee's bank account details to control the risk of people fraudulently paying themselves or other people through the payroll system.

Another preventative process would be to create a rule where the Financial Controller is notified whenever a Greentree user changes a supplier's bank account details to prevent them paying themselves or an associate.

- In today's information age knowledge is king. The last thing you want is for confidential or competitive information to fall into the wrong hands.

To help prevent this, using Greentree Approvals and Alerts rules you can be notified every time a Greentree user's security profile is changed.

A rule can also be created to record an audit trail of everybody logging in as System Administrator where people have the ability to change system settings.



Examples of Approvals & Alerts in Action

- Recently, we have seen significant tightening of the economic environment. When times are tight the last you thing want to do is extend credit to those that doesn't have a good credit rating and then have to spend precious time following up bad debts.

With a simple Greentree Approvals and Alerts rule an approval process can be put in place when setting up new customers ensuring the necessary credit checks are put in place before it too late.

- Let's face it, with the volume and speed which transactions take place in business today, executive management can't be involved or approve every single transaction.

Wouldn't it be useful for you to be in a position to monitor certain transaction types, without the need to approve these transactions individually as they occur? This can be achieved where Approvals and Alerts pushes an email to advise you (for example) when a particular transaction type has occurred eg Customer Credit Notes, Customer Journals, Supplier Journals.

These advices do not slow down the data capture process as no formal approval process is required. They are purely advices to act on as and when such action is deemed necessary.

Validation of Information

There will always be validation issues with documents that relate to conditions unique to businesses that can not possibly be built into a standard business system. With Approval & Alert rules on those documents you can create a set of rules that will either allow or disallow the creation of the document.

Q: Have you ever allocated a Job Manager to the wrong Profit Centre or the wrong job?

A: Standard Greentree product validation won't prevent this, but a simple Approval & Alert rule will prevent it.

Sales & Purchasing

As a generalisation, all businesses purchase things and at some point look to sell a good or service. Having robust processes in place for these transactions types is vital to a businesses well being.

Q: How many times have you placed an order with a company and you wonder whether they have received the order and/or what the progress of that order is?



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A: By using Greentree Approvals and Alerts you can automatically send a customer an email confirming the processing of a sales order removing the guessing game for the customer and freeing up your telephone/email inbox from enquires on sales order enquiries.

Q: Do you have customers turn up at your counter wanting to do business with you only to find that you have put the customer on stop credit? Or your sales counter staff start to process a sales order only to find the order can't be processed because they are on stop credit.

A: Wouldn't be useful for an email to be automatically sent to the customer and to your sales department at the time a customer is put on credit hold when they exceed their credit limit so action can be take at the time. It avoids time wasting and also embarrassment of having to turn customers away from doing business with you. Approvals and Alerts enables you to do exactly that.

- As they say "Where there is a will there is a way".

Q: How often do you find employees will "cheat" the system to process an order leading to all sorts of chaos in stock counts and stock valuation?

A: Simply by putting in an Approval and Alert rule you can create a notification to you telling who is changing stock codes to allow overselling of certain stock items allowing you to change such behaviour.

Another stock control example is using a rule to prevent stock items from being changed to non-diminishing to ensure stock control and GL reconciliation is maintained.

Q: How often do you put budgets in place to manage expenditure only to discover to your surprise (most likely after the fact) that they have been exceeded without your approval or knowledge?

A: The use of Approvals and Alerts can prevent Purchase Orders being raised if the budget will be exceeded. This will then trigger an additional approval process for the Purchase Order to follow requiring the appropriate attention.



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Job Cost / Service

In the Job Cost arena responsiveness and flexibility is paramount where often no two jobs are the same. Measurement and controls still need to be in place to avoid blow outs and to give management peace of mind.

Q: Does your company experience unwanted budget blowouts that put a real strain on cash flow all due to lack of cost control?

A: Job Cost companies using Greentree's Approvals and Alerts get this peace of mind. A good example is where a company dynamically allows multiple job

managers to approve Purchase Orders to a certain value. Any cumulative job manager total above a certain value then triggers a Purchase Order approval process to avoid a cost blow out later on.

Q: Ever find a project was more profitable than you were expecting or a project didn't deliver the profitability that you were expecting because costs were incorrectly assigned?

A: By using Approvals and Alerts you can prevent the changing of the default work centre assigned to the activity code when entering Job Cost AP Invoices to avoid costs being incorrectly assigned.

- Time is money. With traffic congestion the way it is, having a team of service technicians return back to base before the next service job is inefficient and costly.

Q: Wouldn't it be far more efficient and profitable to have a SMS message sent to the field service technician's phone when they are assigned a new service request giving them all the relevant job details?

A: With Greentree's Approvals and Alerts this is possible.

Q: Ever find yourself in the situation where an AP invoice comes in after the job has been finalised and can't be assigned to the job as it can't be reopened?

A: To avoid this situation you can create a rule to stop people finalising jobs so these invoices can be accounted for and the true profit for the job can be reported.



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Financial

Timely and accurate reporting of financial matters is essential to ensure the ongoing health of a business. Greentree's Workflow and Approvals & Alerts can play an important part in making sure this takes place.

Q: Ever find yourself in the situation where customers refuse to pay an invoice because their Purchase Order number is not quoted on your invoice – potentially creating cash flow problems?

A: By simply using an Approval and Alert rule at the time of raising an AR Invoice a warning can be activated telling you a Customer Purchase Order number hasn't been entered on the invoice. This avoids unwanted tension and angst between you and your customers.

Q: Ever find yourself going to pay a Supplier by Direct Credit only to discover later that the payment didn't go through because no one bothered to enter the Supplier's bank account details?

A: This scenario can be avoided by entering a rule where if the payment method is set to Direct Credit, the bank account details must be entered or it will prompt them to change the payment method to cheque and abort the save of the new Supplier.

Q: As a Financial Controller how frustrating for you is it to discover your sub-ledgers are out of balance with the General Ledger because a manual journal was posted to a Control Account? This can call into question the integrity your company's financial reporting.

A; Using Greentree's Approvals and Alerts module can prevent such manual journal entries being posted to control accounts such as the Accounts Payable Control account in the GL to prevent out of balance issues.

Q: How tedious and time consuming a job is it to manually go and take customers off stop credit once a payment has been received and then have to communicate this to all relevant parties?

A: Considerable time and effort for the Accounts Receivable department can be saved by installing a rule which automatically takes a customer off credit hold when a payment is received and at the same time emails the customer and credit department when this happens.

Q: Ever find your Chart of Accounts becomes unmanageable because too many individuals are adding new GL accounts on an ad hoc basis resulting in unnecessary accounts being created and not following a systematic process?

A: This can all be avoided by using Greentree Approvals and Alerts to prevent a new GL accounts being added without forming part of the GL Validation Matrix.



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Debt Collection

Poor cash flow is the number one problem leading to business failure. Using Greentree's Approvals and Alerts can automate and make the management of debt collection more efficient, significantly reducing potential cash flow problems.

- Lets face it no one enjoys phoning up customers chasing money do they? Yet so many businesses are forced into this because they haven't automated their Customer communication to follow up outstanding amounts owed.

Q: Are you one of these businesses?

A: Did you know through the use of Greentree's Approvals and Alerts functionality debt collection communication can be automated?

With a scheduled rule that runs daily - an email to customers can automatically highlight individual invoices that are past their due date. Different rules can be used depending on the numbers of days overdue, with each rule generating a different email.

This allows companies to rest in the assurance that the customer is being advised about the invoice in a timely manner. Greentree can then auto-file a copy of this email communication to the customer's record for later reference.

Another benefit is that customers, on receiving the email, will check in their own accounting system, to see that they have in fact received a copy of the invoice. If not this gives the customer a chance to request a copy before things get out of hand.

"Approvals & Alerts sits over our Greentree system and picks up the things that users often forgot to do before the module existed, saving us errors and therefore money."

David Goodwin, Group Financial Controller - The PA People



Key Benefits

- Integration
- Multiple Approvals
- Group Approvals
- Sequential & Non-sequential Workflows
- Controlled Authorisation
- Multi-layered Rules & Decision Trees
- Delegation of Authority
- Scheduled & Data Driven Rules
- Alerts & Notifications
- External Notifications & Emails
- Instant Alerts Security