

Greentree delivers loads of flexibility to this Aggregate Company's invoicing process

Raising an invoice each time a truck made a delivery simply wasn't an option when on any given day, each truck might make 10 deliveries to the same customer. This had the potential to significantly increase administrative overhead and inundate their customers with one line invoices which is why Jane Chandler, Administration Manager at McCallum Bros. Ltd. opted for Greentree over any other system she evaluated.

The business situation

This family-owned Auckland aggregate company is the leading supplier of sand and red rock to major ready-mix concrete manufacturers, who supply concrete for commercial, industrial and domestic construction use across the Auckland region. McCallum Bros. Ltd. also supplies sand for equestrian arenas, sports field maintenance, beach replenishment and landscaping. Their red rock can be seen throughout New Zealand and is identifiable by its characteristic warm red look. Jane

explains that deliveries to their major customers are on a continuous supply basis and not necessarily a costed job with a one-off delivery date. The systems she looked at treated each delivery as a complete job and raised an invoice accordingly but this simply didn't fit with how the business operated. She says the flexibility to list multiple deliveries on one invoice without it needing to be a completed job could only be found in Greentree and this was a key factor. "The flexibility of Greentree's invoicing alone was good enough reason to make the decision to implement it and our Directors, customers and accounts staff are extremely happy with that decision," says Jane.

Another key factor was business growth which had brought the old Attaché system to its knees. When the Directors couldn't get the reporting information they needed to make informed decision making, Jane contacted the local Greentree Partner. She recalled previous contact with the Greentree Consultant which left her with a positive lasting impression.

Invoicing 'your way'

Jane explains how in the previous invoicing process "we used to do one computerised invoice on Attaché with a manual list of all of the delivery dockets that related to it. This had to be done on a batch-type basis at the end of month so this process took quite a few days and we probably weren't getting our invoices and statements out until about the 10th working day. Greentree allows us the flexibility to add delivery dockets to a 'live' invoice throughout the month so now we get them out by about the 2nd working day." This has had a positive flow on effect to cash management.

Job Costing adapted to track truck costs

Jane says they adapted job costing to track and analyse direct costs associated with each individual truck. Aside from demonstrating Greentree's flexibility, she says this adaptation has been invaluable in ensuring that all costs occurred whilst undertaking core business activities are reported. This is extremely helpful in asset management and presenting an accurate view of direct business related costs.



CUSTOMER
McCallum Bros. Ltd.



INDUSTRY
Construction



LOCATION
Auckland, NZ



**GREENTREE
PRODUCT SUITE**

- Financials
- Distribution
- Job Costing

Business Benefits >

- Flexible invoicing allows multiple deliveries on one invoice
- Greentree's live environment ensures that delivery dockets can be added to a 'live' invoice throughout the month rather than at month-end in time-consuming batches. This has reduced invoicing time-to-customer from 10th working day to 2nd working day
- Improved cash flow
- Job Costing adapted to track truck costs to ensure accurate reporting
- Reporting accuracy ensures management and the Board can rely upon information for decision making
- Competent Greentree partner provides outstanding ongoing support
- Greentree's integrated environment has eliminated manual processes and significantly reduced administration time and overhead
- Implementation and go-live were low risk with no disruption to business continuity

“Greentree has assisted us in making key strategic business decisions which have increased our market share.”

Jane Chandler, Administration Manager – McCallum Bros. Ltd



Simply superior reporting

Business growth was driving a need for more sophisticated levels of reporting and Jane says extracting the data to produce reports was extremely difficult in the old system. She says, “I love how I can drag and drop data into Excel” and this has enabled her to produce timely and accurate reports for the Directors at any time since the information in Greentree is always available and up-to-the-minute. Apart from this, she’s able to produce reports in a meaningful format which everyone understands and the adaptation of Job Costing to track and report truck costs raises the bar on accuracy so management can rely on the figures for a multitude of strategic decisions.

Confident go-live without a parallel system

When the decision was made to implement Greentree, a go-live date was set and Jane confidently states they didn’t run a parallel system because the old system wasn’t integrated so attempting to compare data in the integrated Greentree system was pointless. Another key factor was that Greentree’s best practice and integrated environment meant that business reporting would be so fundamentally different to the way they had been doing things that again, there was little point in running the two systems in parallel. Once all the business data was entered into Greentree, it was live from day one without any disruption to business continuity.

Jane says the Greentree partner was very competent and has provided outstanding post-implementation support. She reckons Greentree has been a very easy system for staff to learn and even a staff member with 30 years service who was initially “petrified and required a little hand-holding” now doesn’t want to think about how things used to be done and the amount of time spent on time-consuming monotonous tasks.

Greentree has streamlined and automated the invoice process whilst eliminating hundreds of hours of manual data processing. Management and the Directors have the level of reporting required to make confident decisions about McCallum Bros. Ltd. continuing reputation as a key supplier to Auckland’s infrastructure customers.

CHALLENGE >

McCallum Bros. Ltd. needed to eliminate manual data processing by significantly reducing the number of invoices related to the same job. There was also a need for more accurate reporting that better informed the decision making process.

SOLUTION >

Greentree Financials integrated with Greentree’s powerful, yet simple to use Job Costing & Inventory module.

RESULT >

Cash management and making key strategic business decisions are made simpler with very accurate and reliable reporting, resulting in increased productivity and a boost in market share.

ABOUT McCALLUM BROS. LTD

McCallum Bros. Ltd. is a family owned Auckland-based business which has been operating since 1904. They employ around 50 staff and operate four vessels that are involved in sourcing and transporting aggregates around the Hauraki Gulf. The company also maintains three supply yards in the Auckland region and delivers materials to customers on a daily basis. They maintain a fleet of truck and trailer units to ensure customers receive prompt and efficient service.

For more information visit www.mccallumbros.co.nz

ABOUT GREENTREE

Greentree International specialises in developing highly effective business management software solutions. The Greentree product has been developed by the authors of CBA, arguably the most successful business software package for small to medium sized businesses in Australia and New Zealand.

In choosing Greentree you are selecting a business system that will truly empower your organisation today and grow with you into the future. The Greentree Partner Network provides a highly skilled local support team that will ensure you achieve tangible business benefits. Greentree has also been recently recognised as a global ‘Rising Star’ by MIS magazine Australia.

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“very, very, responsive!”