GREENTREE BUSINESS SOFTWARE

Review Update, September 2012, by David Carter

David Carter has some 20 years of experience writing about accounting and ERP software, and during that time he's reviewed most of the packages available for mid-sized businesses in the UK. He was already familiar with Greentree, having previously reviewed its financial capabilities for AccountingWeb.

"This is outstanding software. Greentree ticks all the boxes."

This is an update of a review of Greentree Business Software written for the accountants' website www.accountingweb.co.uk in May 2007.

The 2007 review concentrated on Greentree's Financial Ledgers. This update results from an afternoon spent in April 2012 when Greentree staff took me through the operational areas of the software such as sales order processing, stock control and customer relationship management.

The update looks at some of the design principles behind the software, and then at Greentree itself as a company.

OVERALL DESIGN PRINCIPLES

Modern business (or "ERP") packages hold vast amounts of company data. The accounting side is largely a matter of passively recording all this data. But once you get into operations, more imaginative software designers have realised that you can start to use the data proactively rather than passively in order to run the business.

There are two main ways to achieve this – firstly, by giving instant access to data from any part of the system; secondly, by engineering "intelligence" into the software.

1.   Instant access to data via 3D Live

When you are talking over the phone to a customer you may need to access instantly data that is held in different modules of the software - orders in the Order Book, payments in the Sales Ledger, contacts in CRM, stock balances in Stock Control, purchase orders on products which are out of stock.

Greentree's recently released 3DLive enables you to access data in any module and get this "360 degree" view of a customer - or of any key item such as a job, a supplier, an employee, an asset etc.

With 3D Live any screen can be split up into several sections – "panels" – each of which views a different segment of the software. Each panel can be configured to the operator's requirements. So in one you have a list of customers, in another a list of products; in another a list of outstanding sales orders. When you select a particular customer, the screens change correspondingly to show the orders and invoices for just that customer.
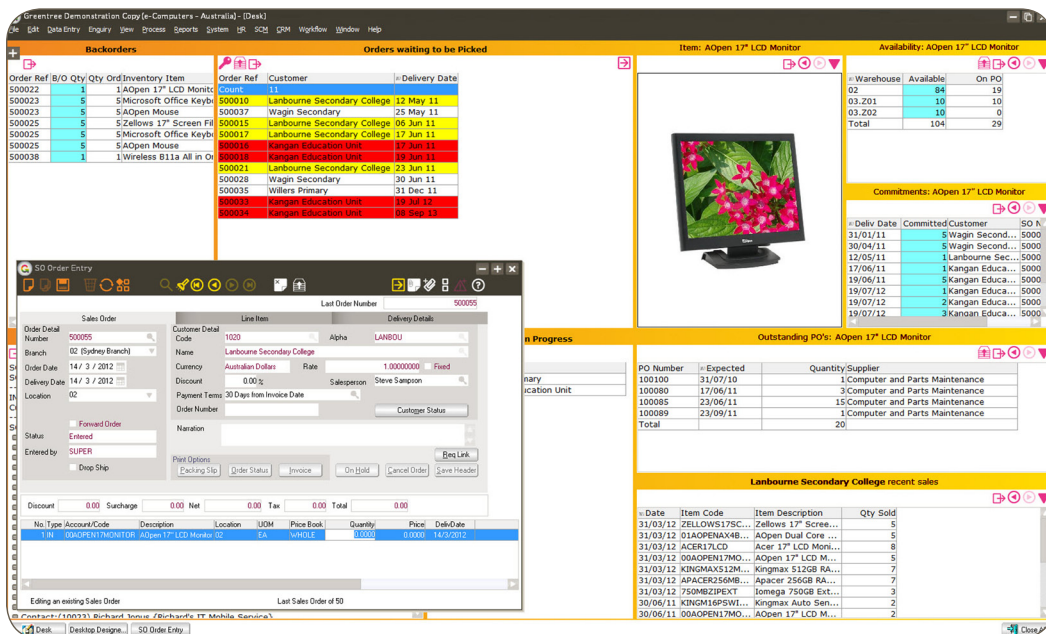
If the client wants the same item as they had last time, simply drag that item from the history panel and it is added to the new order.

Panels can be customised for each department, and all the different activities of the department shown simultaneously in different panels of the one big screen.

So for the Warehouse Dept you might set up a big screen showing orders awaiting picking, orders despatched today, stock items close to re-order point, etc. Or for the Service Manager you might set up a calendar/planner view showing all your staff with planned leave and job tasks allocated to them. Another panel could show unallocated jobs: to allocate and schedule them, simply drag and drop across the panels.

Sometimes you want to pull everything together into one place, so Greentree displays a client history that lists ALL transactions with this customer of whatever type - orders, deliveries, invoices, CRM emails, quotes, sales leads, payments, whatever. The operator can see the full story, with the ability to filter and sort the list as required. Excellent.

2.   Applying intelligence to control the business

Every order has a delivery due date, every invoice a payment due date, every contact has a next call due date, and so on. Working from these future dates the computer can schedule people's work and give them "To do" lists in advance so that the work gets done on time.

Using due dates this way is a very simple way of making software "intelligent"; but Greentree have gone a lot further and engineered various facilities into the software such as "approvals and alerts" and "Business Process Management" that enable you to enter business rules and control transactions as they pass through the system.

So, for example, with purchase orders you can set up an authorisation procedure whereby requisitions can be routed to specific individuals for authorisation, perhaps to different individuals dependent on the amount to be authorised. And you can view the pipeline between departments to see where requisitions are being held up.

Or if you are a service company that guarantees to respond to customer calls within three hours, you can write a procedure that sets the clock ticking the moment the client rings, and ensures that the call gets sent around the organisation to tell the right people at the right time.

In fact, if you have a complex process in your organisation whereby after an order is received person A should do x after 3 days, then person B should do y after 7 days, you can write the whole procedure into Greentree. Once the initial order is entered, the entire procedure is triggered off and Greentree will generate notifications and documents to those involved and monitor the progress of each stage.

"Workflow" products that do this sort of thing have been around for some time, but they are separate add-on packages. What is so impressive about facilities like BPM and 3D Live panels is that they are integrated into the fabric of the software and are a standard part of Greentree.

3.   Greentree – the company

When buying a package, you have to consider not just software, but the company behind it. In a software company it is the technical people who are the soul of the product, particularly with an ERP package which is vast and yet still a single entity.

So the "techies" are key. But time and time again in our industry a great young software product makes a name for itself, gets bought up by a big organisation and then, a year or two later, the original developers leave, and the driving force behind the software goes with them. Some piecemeal development still takes place, but really this package has plateau'd – it isn't going anywhere.

Techies do not thrive in big organisations. They are craftsmen and have a different value system. In the politics of a big company they are easily outmanoeuvred by the marketing and finance men, lose heart and leave. For me then, the central question about a software company is this: "In this organisation do the techies have a place of honour at the top table?"

From this perspective Greentree look good. They wrote their first business software in the 1980's but have stayed independent, and relatively small and compact. Somewhere in their literature they describe themselves as "unashamed technology buffs with one obsession: building the best business software". In their home territory of Australia and New Zealand they have been very successful; and they have now been operating long enough over here to develop features special to the UK market such as Intrastat and Payroll.

For more information: www.greentree.com

CONCLUSION

In the 2007 review I concluded that Greentree was "a product of the first rank". Five years later the verdict remains the same. This is outstanding software, and the way that instant data access and workflow intelligence have been engineered into the fabric of the software is most impressive. The company is a small, independent outfit, enormously experienced but still hungry for perfection. So Greentree ticks all the boxes for me - just as long as they remain independent and don't sell out to a larger organisation.

David Carter: September 2012