

Customer success story  
Palfinger Australia

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Australia

Greentree product suite

Financials

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# PALFINGER GAINS BIG TRANSACTION CAPACITY

## BUSINESS BENEFITS

- Large volume transaction processing capacity comfortably updates a price list of 7,000 to 10,000 line items with extra capacity if required. This would be impossible to undertake manually.
- Inventory management time has reduced whilst accuracy has improved.
- Processes for improvement have been highlighted and subsequently tidied and tightened.
- Integration and automation improves overall accuracy and timeliness of reporting.
- Improved inventory management and tailored invoicing process improves customer service levels.
- Historical data is now readily accessible for analysis, which has removed the arduous task of finding, collating and analysing paper files.
- The value of stable consultancy saves lots of time explaining business needs and instills confidence in the future.
- Greentree scalability matches business growth.



"Greentree has provided us with the right tools to manage our core business activity with lots of future capacity. It's also enabled us to improve business processes, which have benefited from refinement."

Jan Downing, CFO, Palfinger Australia

Greentree's ability to update large volume price lists was the key driver in the decision to make the quantum leap from a manual to an automated environment for this well-known crane manufacturer.

## The Business Scenario

Palfinger Australia had been manually accounting for and distributing thousands of parts for the world-leading brand for years. This had been working just fine; however management could foresee that business growth was placing unsustainable pressures on manual systems and processes.

Specifically, the human resource capacity required to update price lists of potentially 40,000 line items of inventory wasn't physically possible, and would eventually constrain growth.

## The Challenge

To accommodate future growth and mitigate the impact of automation on business processes and staff, management required a big-capacity system which both the company and staff could grow into over time.

Jan Downing, Chief Financial Officer, was well aware that transitioning the organisation from a manual to a computerised environment would be a much bigger task than upgrading from an existing computerised system to another. A staged approach was decided upon and the logical place to start was inventory management – a core business activity.



## Improved Inventory management

A key driver in the decision to implement Greentree was its capacity to potentially update prices of up to 40,000 line items of inventory. Jan explains that although they're not updating that many, Palfinger Austria has that many items they could potentially order. Currently, they're carrying between 7,000–10,000 items, which warrants some serious attention.

A manual stock-take was time-consuming, since staff worked from one paper file. Jan says that unfortunately, computerisation won't replace a physical stock-take and the old adage 'garbage in garbage out' holds true.

But Greentree is helping to trap and prevent errors, plus made it quicker and easier to identify stock discrepancies. It has also helped to highlight the areas of the inventory management process that needed tidying and tightening.

Overall accuracy and the quality of management time have improved. This is because less time is spent physically monitoring stock, so staff now spend more progressive time on improving the processes Greentree has highlighted.

Reporting and analysis of stock figures has provided some real time savings. Jan now has historical information at her fingertips which helps identify and analyse trends and anomalies. Previously, she had to pull out and examine numerous paper files, which was tedious and time-consuming. Summary reporting of stock figures has also reduced time, since she no longer needs to manually total figures – Greentree automatically calculates these for her.

## Easier invoicing and quicker end-of-month process

Integration has made it much easier and quicker to generate an invoice from inventory and complete the end-of-month process. Palfinger has leveraged the Greentree partner's knowledge of Greentree to have invoicing set up exactly the way they want it. Jan says customers have benefited from a streamlined and automated end-to-end process which means they get simpler, more accurate invoices.

## Stable consultancy instills confidence for future

"Having the same consultant reduces the amount of time we need to spend explaining our business requirements and this makes a big difference for us," Jan explains. "We needed a bit of support initially, since staff needed to not only make that psychological leap from manual to computerised, but also needed to find their way around Greentree but these days, calls for help are infrequent." The Greentree partner provided good training and the consistency of a stable consultant "is laying the foundation for confidence in a good ongoing partnership in the future".

## Greentree scales for growth

Jan reckons that implementing Greentree probably happened just in time, as Palfinger has grown since it first went live. She concedes that it simply wouldn't have been physically possible to manage business in inventory and personnel, had they still been using a manual system. "Greentree has scaled to match that growth and we expect this to keep happening over the coming months and years."



Palfinger Australia has been distributing cranes since 1977. The highly recognisable brand was first manufactured in Austria in 1964. They are manufactured to the stringent European standard, DIN15018, class H1-B3. Parts and service are available through Palfinger Australia branches in Brisbane, Newcastle, Sydney, Melbourne and Perth. An authorised dealer is located in Adelaide.

[www.palfinger.com.au](http://www.palfinger.com.au)

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