MYOB Greentree

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Customer Relationship Management

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Introducing MYOB Greentree Customer Relationship Management

The financial heart of any business is the relationship between the organisation and its customers. Mismanaging these relationships diminishes your ability to capitalise on new and existing business opportunities.

MYOB Greentree's Customer Relationship Management (CRM) lets you easily track contacts, create more targeted marketing and sales initiatives, and increase the value of your relationships with both existing and potential customers.

Our CRM suite delivers the total solution, including full integration into critical financial and distribution suites.

Contact and Relationships

MYOB Greentree's CRM suite captures all the information you need to effectively manage the relationships you have with your customers, suppliers and other organisations.

Organisations, contacts and relationships

Manage all your relationships from one system. Capture and organise all your business contact information. Use automatically generated organisation charts to visually present organisation structures.

Data management

Importing and de-duplicating of data is quick and easy. There is no need to store and maintain mailing lists externally. Email or postal lists are always accurate and up-to-date.

Data security

Protect the confidentiality of your sensitive data with built-in security – you decide who can see what.

Integration with Microsoft Office

Get the power and familiarity of existing desktop software with direct integration to Word, Excel, Outlook and other mainstream email systems.

Document Management

Review customer communications, documentation and records with easy, on-demand document retrieval and storage.

Sales and Marketing

Manage your business opportunities, leads, prospects and pipeline with MYOB Greentree's sales and marketing module.

Sales cycle management

Manage the entire sales life cycle, from first contract right through to invoicing. Drive the performance of your sales team using methodical, user-defined action plans. Identify and action opportunities to improve revenue through tracking buyer behaviour trends.

Marketing campaigns

Dramatically improve your marketing results using highly targeted lists. Simplify the effort involved using built in email, telephone, mail and event management tools. Enhance campaign effectiveness with automated response management. Set and measure campaign goals to control costs and results.
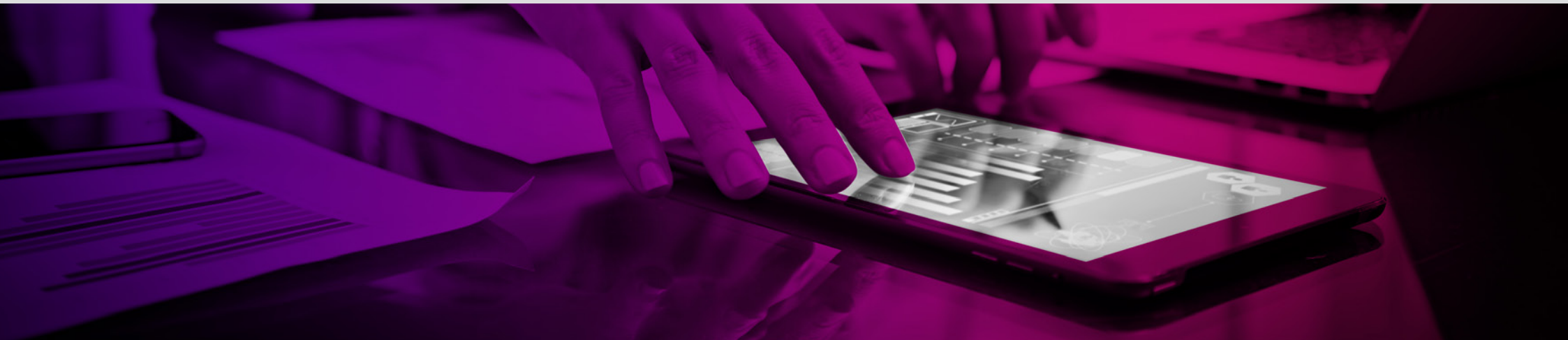
Quoting engine

Eliminate quoting errors with immediate access to accurate, customer specific pricing. Stay in control throughout the quote lifespan with version control that tracks right through to sale and reporting on outcomes. Leads and opportunities can easily generate quotes, and quotes can generate invoices, sales orders or jobs to drive productivity improvements.

Total visibility with Microsoft Office integration

Deliver faster results using the familiar desktop software tools for email and mail merge. Manage tasks and appointments without having to adopt new systems.

MYOB Greentree Sales-Mobile

MYOB Greentree Sales Mobile connects your sales engine to your business engine in the most powerful way possible – whether you're at your desk, on the road or overseas.

Workspace for Sales

Designed for salespeople. Key data is always in view, with the ability to configure what's on screen to fit the way you work.

Organisations

Everything you need to know about customers, suppliers, resellers or prospects is right where you need it.

Contacts

Displays all your contact information – customers, suppliers or prospects – with an Activity tab for more details and maps.

Relationship centre

All activities for organisations are available in one place – historical and upcoming.

Catalogue

Provides real-time access to detailed product information on mobile devices, replacing printed catalogues.

Quote Form

Quoting's never been faster, easier or more accurate. Utilise live prompts with pre-populated fields.

Price & Availability

Accurate product pricing with automatically calculated discounts, plus real-time availability with smart substitutions and possible add-ons.

Leads and opportunities

Displays a great overview of all your live leads, highlighting the actions next required.

Sales View

An up-to-the-minute snapshot of your organisation's end-to-end sales process.

Sales Orders

Instantly create a sales order on the spot and get sign-off. Utilise Quick-lists for the customer's favourite items or sales history for repeat orders.

Sales Pipeline

A graphical view of your sales leads that can be weighted based on probability of closure, with detailed drill-down to each lead. Update in real-time to accurately track leads and forecast revenue.

Bookings Management

Managing events and coordinating resources is a breeze with MYOB Greentree's bookings management module.

Resource planner

Maximise valuable resource capacity and revenue with the user-friendly calendar format planner that gives staff a visual view of bookings (showing venues, staff, volunteers, equipment and more). Keep your eye on the full picture with reporting tools.

Attendee management

Quickly and easily create targeted invitation lists with the range of filtering and selection tools available. Drastically improve attendee communications with built-in email and mail merge actions.

Financial management

Ensure your event coordinator uses the financial summary to be in full control of the event's financial position. Dramatically reduce administrative overhead and coordinate collections with direct integration between invoicing and accounts receivable.

Knowledge Base

Drive customer service and productivity improvements with MYOB Greentree's Knowledge Base module – a framework for systematically storing information and providing flexible yet secure internal and external access.

Document Library

Ensure consistency of information across the board (e.g. product data, procedures, FAQs, support documentation, specifications). Effortlessly retrieve information with the simple contextual search function. Easily configure your exact information needs using the flexible library structure.
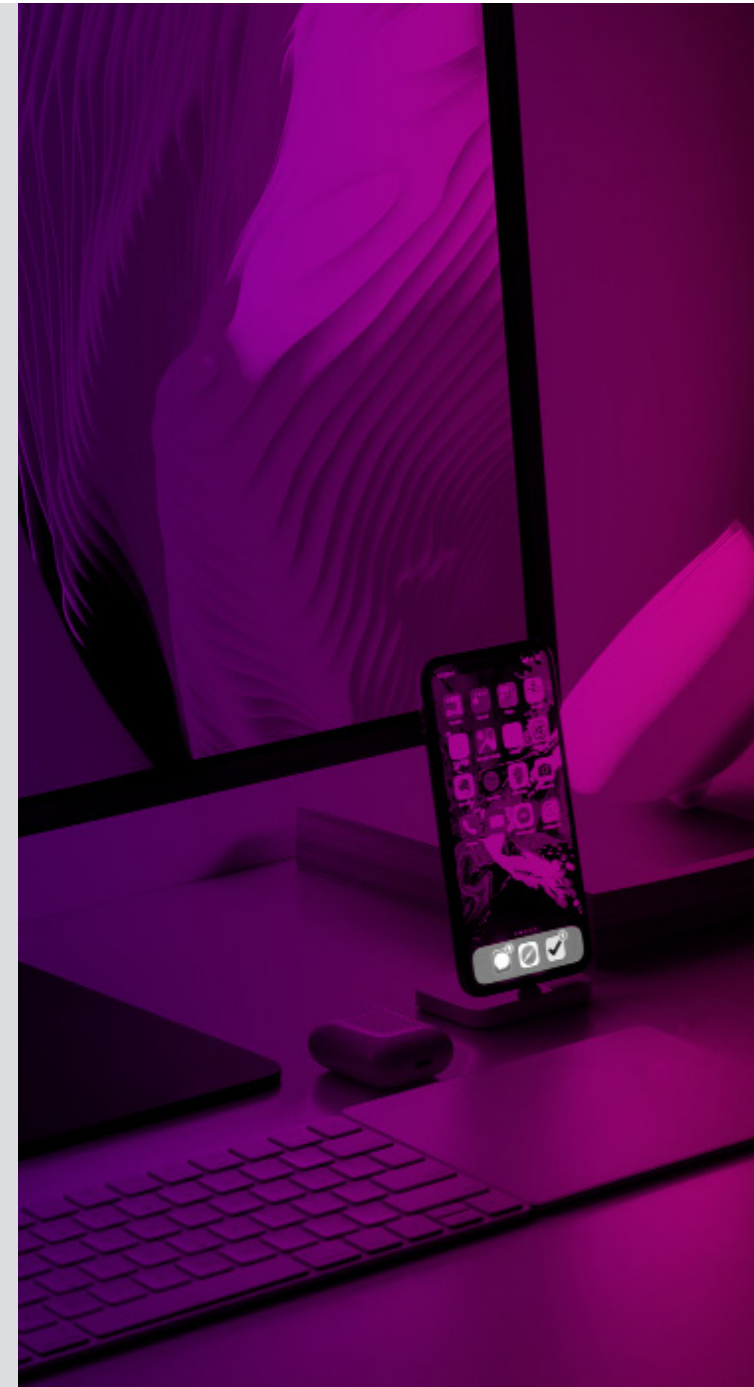
Communication engine

Communicate with contacts directly from within the library by sending pages and attachments using the integrated email function.

User defined access

Radically reduce the number of support calls by giving customers and field staff access to the information library. Control which teams or customer groups have access to specific sections of the library. Protect the security of your data with confidence. Easily access the library from anywhere with the web interface.

Document archive

Use the built-in version control feature to eradicate problems caused by incorrect documents.

Want to learn how MYOB Greentree
can work for your business?
Schedule a demonstration today.

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