

MYOB Greentree

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# Mobile Solutions





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# MYOB Greentree Mobile Solutions

In today's increasingly competitive and fast-paced marketplace, customers demand rapid, accurate service together with reduced costs.

When your business is already running lean and delivering quality results, what can you do to further increase productivity and service levels – and even reduce costs?

Browser based mobile applications can unlock efficiencies, eliminate admin backlog, reduce data errors and increase customer satisfaction. Our mobile solutions liberate your service, sales and warehouse teams from bottlenecks or hurdles that get in the way of giving current information, winning business or fulfilling an order.

- Accurate information enables stronger customer service outcomes
- Increase sales by giving teams the information and tools they need on hand to close the deal
- Easier and more integrated management of workloads
- Remove administrative backlogs
- Make use of highly customisable, intuitive workplaces.

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# MYOB Greentree Sales Mobile

Successful sales teams need to be in the know. For business development professionals on the road, being cut off from core systems can be the difference between winning or losing a sale.

MYOB Greentree's mobile sales functionality connects your revenue generation engine to your business engine in the most powerful way possible: anytime, anywhere access to an engaging user experience designed specifically for salespeople.

## 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 and prospects.

## Contacts

Displays all your contact information – customers, suppliers and 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. Enjoy the convenience of live prompts with prepopulated 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 next actions 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.

## 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.

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# MYOB Greentree Service Mobile

MYOB Greentree Service Mobile transforms the way your field staff work with highly intuitive software design that connects them directly to your core business system. Work faster, smarter and deliver a better customer service experience than ever before.

## Workspace for Service

Your field staff will always have the information they need, right where they need it – displayed in a way that makes sense to them.

## Organisations

Everything your service team needs to know about their customers and suppliers in one easy to search location.

## Contacts

Comprehensively capture all your contact information, including an activity tab to track more details, and maps embedded to make every contact easy to find.

## Relationship Centre

All the activities related to customer and supplier organisations brought together in one place – historical and upcoming.

## Service Calls and Requests

Identify and prioritise work that is yet to be allocated, then track each job as it is completed, capture signatures, and seamlessly move to invoicing.

## Assets

See the equipment your customer owns and its service history as recorded in your system. Records are automatically updated as the work is completed.

## Timeline

Know the key times and dates for any service work based on your agreed SLAs or regulatory requirements. Using the Approvals and Alerts engine, build escalations based on those deadlines.

# MYOB Greentree Timesheets Mobile

Capture time on-the-go, as you work. Designed for use by workers in the field or back at the office. Incredibly intuitive and easy to use, built on the latest browser based technology for 'work anywhere' connectivity. Configure the fields to work the way you do, with in-built reminders so you're never late. Our mobile timesheets not only revolutionise how you capture time, but how you bill for it as well.

## **Summary or detail**

Record the total time recorded or log all the details of start, finish and break times. Save at any point, then return to add more detail before submission.

## **Easily configurable**

Capture time based on work done, who did it, job rates or any other variable. Ensure maximum revenue can be charged for work completed.

## **Format it your way**

Using Screen Designer, tailor Timesheets to work the way you want it to. Reorder or hide fields and columns, change labels – work it your way.

## **Built-in reminders**

Users are alerted if they're late with timesheets or too little (or too much) time appears to have been recorded.

## **Approvals**

Use Approvals and Alerts to enable real-time approval, plus manage queries on a line-by-line basis so the rest of the timesheet can be submitted on time.

## **Summary view**

Instantly scan the total hours recorded against the hours scheduled.

## **Work anywhere**

Designed for the field, browser-based access to ensure an accurate capture, minute-by-minute, as you work.

## **Cross company**

If you work for a group of companies, each company is assigned a line in your timesheet with the related jobs automatically displayed when selected.



# Mobile warehouse operations

How can you increase productivity, reduce costs, improve process efficiency and increase revenue without major effort or staff upheaval?

MYOB Greentree's Windows based Mobile Warehouse Operations functionality can provide the platform for your business to take it to the next level.

## Inventory Management

Perform full or partial inventory counts and variance management. Check availability of any item at any location at any time. Transfer items between locations and bins to make inventory adjustments easy.

## Picking

Ensure the right item is picked and packed every time, using integrated barcode scanning. Enable orders to be quickly picked with mobile picking plans by location, bin or sales order. Allow for variations and changes encountered on the floor to be captured and dealt with at time of discovery.

## Receiving

Scan incoming inventory, and instantly record variances and damaged goods for quick rectification. Guide warehouse staff with designated put-away locations.

## Despatch

Print packing slips, capture freight, packaging and consignment information. Use Alerts for Email or text message customer notifications.

## Scanning

Speed up input and eliminate errors by using the built-in device scanners.

## Signature Capture

Capture signatures to complete field documentation.



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

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