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MYOB Greentree

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Workflow and Business Process Management

Contents

Business Process Management

Processes are at the heart of every business. They dictate the results that are produced, the effectiveness of the staff involved and, ultimately, the profitability of the business itself.

Harnessing these processes to deliver critical information at the right time – and being able to automate as many of your business processes as possible – is what MYOB Greentree does best. Look forward to exponential improvements in productivity, profitability and engagement.

With MYOB Greentree's BPM, you can:

Reach across the organisation

MYOB Greentree's BPM works across the entire MYOB Greentree product range, making it easy to reach into every area of your business, from Purchasing through to Sales, Accounts, HR, Inventory and more, without the need for complex and costly mapping between discrete systems.

Build processes to match your business

Good processes should match your business needs, not the other way around. MYOB Greentree's flexible BPM enables you to build the right, unique processes to meet your business reality – ensuring processes are performed consistently and eliminating the potential of damaging human error.

Optimise the exceptions

MYOB Greentree's BPM targets the areas that matter to you. For example, you may have one customer who represents a significant portion of your business, for whom it is appropriate to have unique processes, therefore prioritising their needs.

Make intelligent decisions

MYOB Greentree's Workflow displays give you the total role-based visibility and transparency you need to start making effective, informed decisions by knowing exactly what is happening in your business.

The Greentree BPM Layers

At the core of Greentree's BPM is Active Desks which gives you the visibility you need to make effective decisions. Rules and Escalations allow you to identify and manage events as they come in; both the events expected to happen and those that don't. The Process Flow Designer is a planning system that allows you to graphically build both simple and complex processes.

Process Flow Designer (BPM)

Escalations Engine

Layer 3

Rules Engine (Approvals and alerts)

Layer 2

Base Workflow (Active desk)

Layer 1

Foundation

BPM and Process Flow Designer

BPM and the Process Flow Designer bring all the components together into a planning system that empowers you to graphically build both simple and complex processes to manage and support your business and people.

Full graphical designer

Develop and configure your own business processes without the need for expensive programming resource.

Self-documenting

Automatically define and document your processes within MYOB Greentree, making sure you are compliant with this aspect of standards requirements.

Simple processes

Simplify routine tasks with one-step setups and point-and-click methodology. Remove damaging human error and unnecessary administration by simplifying and formalising simple tasks.

Complex processes

Improve your business productivity by defining complex processes, including people, data, rules, events, decision 'trees' and multi-streaming from within MYOB Greentree.

Escalations

Use Escalations to easily monitor by exception, e.g. to identify actions that have not been completed on schedule. Escalations can be automated to re-assign tasks or alert managers as required.

Track and audit

At any point in time, track any task to see what point in the process it has reached. Use the Active-steps facility to show you what tasks have been completed and which tasks are pending. Ensure full auditability by means of total documentation of all events in the process.

Information and Document Management

MYOB Greentree's Information and Document Management modules create a simple yet comprehensive functionality to the Workflow suite – receiving, recording, storing and retrieving all the necessary documents, whether they come from MYOB Greentree or from a non-integrated system.

Attachments and links

Attach any file to any record in MYOB Greentree. For example, a photograph to a service job or an excel spreadsheet to a ledger journal. Link any record held in the MYOB Greentree database to another, making it easy for users to find relevant information related to the record they are viewing, e.g. supplier invoices and customer orders.

AutoScan

Automatically scan and attach a document to the record, resulting in immediate productivity improvements. For example, auto matching of supplier invoices to their electronic equivalent in MYOB Greentree, simplifying the approval process with all the information stored electronically in one place.

Data import manager

Automate data file imports from non-integrated systems into MYOB Greentree.

Active Workflow

Take charge with an instant snapshot of real-time key business information, live at your fingertips.

Configurable desktop views

Provides a desktop for each team or individual displaying live the information required for them to carry out their tasks, basically their live to do list. This enable users to drill into the information, providing for more detail and then action it as required.

Truly live data

Have data updated in real time, vastly reducing the risk of errors or omissions based on outdated information.
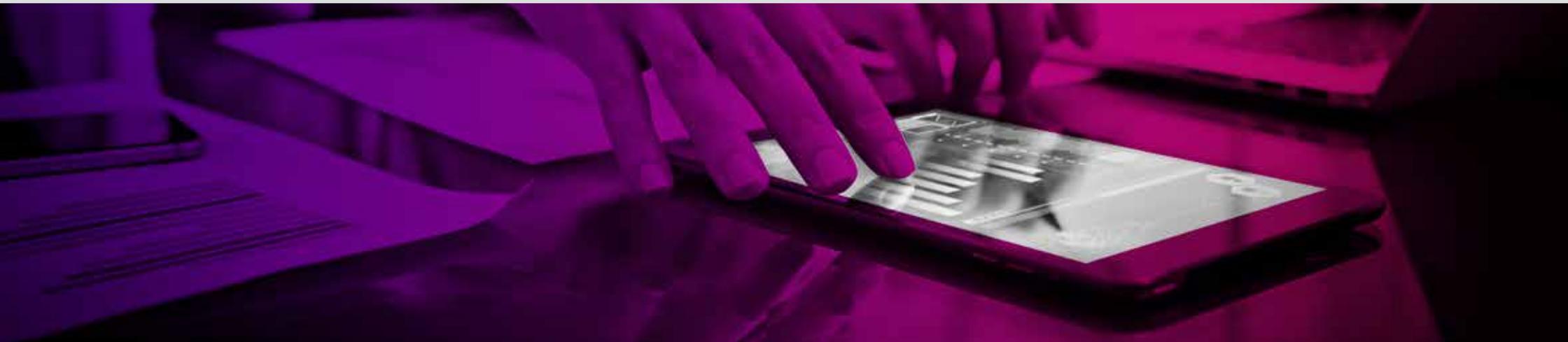
3D Live

3D Live adds new depths and layers to MYOB Greentree Workflow active desktop, giving you a fully configurable heads-up display in multiple panels. It doesn't just make information available, it anticipates what you want to see, and colour coding allows you to prioritise it any way you wish. If you want to see more, the relevant panel expands with a single click.

Workflow management

Create immediate productivity improvements by empowering managers or supervisors to use Workflow Desktops to monitor and manage the current team workflow, and to allocate or reallocate work.

Approvals and Alerts

Increase the day-to-day productivity of your business. Greentree's Approvals and Alerts can help automate the daily processes in your business using specifically designed workflow tools that allow your organisation to ensure critical transactions, documents, or records are automatically monitored and approved through the appropriate chain of command.

System alerts

Define unlimited rules to trigger alerts from across the MYOB Greentree system to automatically notify users of critical information, such as when a customer goes over their credit limit. Design alerts based on scheduled or data-driven rules.

Approval management

Have your approvals process configured to completely suit your business needs, e.g. for a multi-level approval process, including groups, multiple and sequenced, or based on events or exceptions.

Approvals on the run

With web or mobile interfaces, make sure approval processes are not held up while you or your staff are out of the office.

Flexible notification options

Enable alerts to get through with flexible delivery options, including email, pop-up notices and text messages.

Fraud prevention

Ensure your business complies with the internationally accepted compliance standard Sarbanes Oxley, as well as other jurisdictional requirements. Maintain compliance with approval rules that make fraud difficult, and alerts that highlight potential problem areas.

Initiate new business processes

Use Alerts to trigger the start f a new business process, e.g. purchasing a fixed asset triggers the creation of a fixed asset in the Fixed Asset Register.

Mistake Prevention

Define rules in the engine that prevent users from breaking your specific business rules. e.g. don't allow a specific price book to be used for a specific customer group.

Escalations engine

Use Escalations to monitor by exception, e.g. to identify actions that have not been completed on schedule.

Screen Designer

Screen Designer lets you design your own work processes and terminology into the screens across your organisation – no expert needed.

Change it yourself

Armed with a good understanding of MYOB Greentree, create different versions of screens and forms that work the way you do.

Take control

You decide what you see and how you work through a form or process; saving time, improving accuracy and increasing productivity.

Change what you see

A Design Palette offers up all the options available to you depending on the screen or form you're working on.

Change your mind

An unlimited ability to undo and redo the changes you've made.

Call it what you like

Use the terminology your business uses, so everyone in your organisation instantly knows what the software is saying.

Move it where you like

Move, manipulate and hide fields, labels, columns and tabs to suit the way you want to work.

Group it your way

Do it yourself. Simplify your workflow, reorder tabs, switch off those you don't need or create new ones.

Automate efficiency

Reduce the opportunity for error. Hide or lock fields that can't be changed, and make vital fields mandatory.

Flexi-Forms

A key benefit of the new browser interface is Flexi-Forms. They let you get information in and out of your organisation in the most efficient and accurate way possible. Change the way a form works based on the team it's for, the device it will be displayed on, where and how it will be used – all with no technical skills required.

Smart search fields

New smarts to help you find the right information with complete search-enabled fields.

Smart line entry

Instantly check that what you've entered is correct. Options automatically display as you enter the data.

Clever grids

Make the most of the visible real estate, consolidate fields and columns based on what you need to see most often.

Pop-up forms

No more scrolling. A small screen view of the fields is available in a line. Quick, simple and tablet friendly.

Multiple versions

Use Screen Designer to create new versions of a form to meet the needs of different users, teams or devices.

The Zone

A priority information display area at the top of your screen, keeping vital information top of mind in real time.

Smart buttons

Click on a Smart Button to see the actions available to you. Options change based on where you're working in a screen.

The Asterisk

No matter where you're working, the Asterisk instantly displays all the available options, actions and information.

eDocs

eDocs slashes the time it takes for you to receive, route, code and approve documents – from invoices to remittances, statements and expenses. You'll be amazed how much time you save.

Electronic routing

eDocs electronically routes documents through your MYOB Greentree system for coding and approval.

Faster, more accurate coding

eDocs uses a simple screen to code and approve the document, with the original PDF alongside. No data entry is required; you simply tick the appropriate account codes. Regularly used account codes are displayed first.

Paperless approval

Log in and approve invoices and other documents in seconds, making it easier than signing off with a pen.

Visible status updates

You will know exactly when a document was received, who it was routed to and when, and who it is currently with.

Never pay twice

eDocs checks for duplication not just based on the invoice number but on the date, value and size of the related PDF.

Customer remittances

Allows you to mark which invoices are being paid (or partially paid) on which date. Once payment is made, simply match your receipt to the remittance.

Supplier statements

Reconcile invoices and route payment runs to approvers with the invoice PDFs alongside the eDocs invoice and purchase order approval details.

Expense Manager

Email a photo of your receipts to eDocs, then effortlessly code, process and approve expenses.

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

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