CUSTOMER RELATIONSHIP MANAGEMENT
BOOKINGS MANAGEMENT

Greentree®
BUSINESS-BUILDING SOLUTIONS
"very, very, responsive!"

Greentree® Bookings Management

Key Benefits

- Invitation lists
- Bulk e-mail & mail merges
- Resource planner
- Financial management & profitability
- Direct quotes & invoices
- Reporting
- Security

Comprehensive and integrated co-ordination of events or resource bookings can be a major challenge for many organisations. Greentree's Bookings Management provides a flexible, easy to use and efficient solution for organisations that require co-ordination of events or booking of resources.

Its total integration with other Greentree suites enable Bookings Management to handle all aspects of bookings, including confirmation letters and invoicing where applicable.

The industries and processes that Bookings Management can be applied to are very extensive and include, but are not limited to:

- Corporate Hospitality Management
- Professional Training Courses
- Seminar Logistics & Accommodation
- Venue & Studio Management
- Talent Management
- Camping Sites

Invitation lists

Inviting customers or prospects to a seminar, conference or business development function has never been easier. Bookings Management provides a timesaving tool for creating your event's invitation list, drawing on Contact records in Greentree, using a number of different methods such as Inclusion/Exclusion criteria, amalgamation of existing lists, manual contact selection and with the ability to apply the filtering processes repetitively if required.

Bulk e-mail & mail merges

Bookings Management includes the ability to send selective or bulk emails as well as perform mail merges, which can be extremely useful when issuing invitations or distributing update information for existing bookings.

Emails or form letters sent are recorded as communication records for each recipient, providing the Bookings Co-ordinator with an audit trail of contact and a searchable reference point for future use.

"Very, very familiar!"

Resource planner

As Bookings are recorded in the system, they are auto-matically reflected on the Greentree Resource Planner, a simple graphical interface that gives a visual account of resource deployment. Users can drill down to view de-tailed information about either the attributes or capabili-ties of the given resource, or the details of the individual Bookings.Your team will quickly warm to the use of the Resource Planner as its calendar format and functionality are very familiar and user friendly.

The Resource Planner can be utilised by a wide array of industries, with its versatility enhanced by several features, including:

- Day or Night orientation for use in an accommodation bookings
- User-defined allowance/disallowance of 'double-bookings' with respect to each resource, or a group of resources
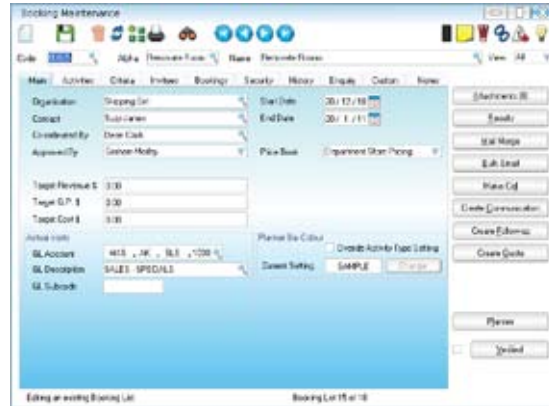- Seating, Table or Room allocations for conference, seminars or dinner bookings.

Financial management & profitability

When Bookings Management is used for revenue gen-erating activities, the related income and expenses are tracked, and posted to the nominated General Ledger accounts. A financial summary provides the co-ordinator with a breakdown of the activity's profitability compared with the targets specified at the outset.

"We are pushing the boundaries of CRM. We have extremely complicated CRM, fund raising and booking requirements. Our experience in the field means we require a sophisticated product but the integrated system we wanted has been achieved."

John Cross, Director of Business & Finance - Anglican Youthworks

"Very, very integrated!"

Related Modules
- Contacts & Relationships
- Sales & Marketing
- Accounts Receivable
- Knowledge Base
- Workflow
- eCRM
- Customer Services

Direct quotes & invoices

When chargeable Bookings are made, a quote can be generated directly from the Bookings screen. Once the Quote is accepted, an invoice can be automatically generated, and update the customers account in Accounts Receivable.

Reporting

A range of reports are provided, with the capability to select by a wide range of filters, including date ranges, 'Co-ordinated By','Approved By', and price level. Users can also design their own reports using the powerful built in Greentree Report Writer, or with external reporting tools that support Open Data Base Connectivity (ODBC).

Security

Bookings Management utilises the highly versatile security structure found in all Greentree modules. When applicable, security administrators can utilise generalised, 'team-based' rules to specify a department or team's ability to either view or edit individual bookings.

CLIENT SPOTLIGHT:
The PA People

Established in Sydney over 30 years ago by one of the present directors of the group, the original aims of the CST Group were to provide cost effective public address systems. These aims were met through sales, hire and installation of value-for-money equipment.

Soon after its inception, a step forward into manufacturing was taken to complement the expanding sales and rental operations. The company's activities are now grouped under two trading names - The PA People and Creative Audio.

The PA People is a specialist contractor in the areas of Sound Reinforcement, Performance Lighting, Audio Visual Systems, Video and Communications. Over the past 30 years the company has developed a reputation as one of the industry leaders, with major offices in both Sydney and Brisbane, and associates located in Melbourne and New Zealand.

For more information visit:
www.papeople.com.au

"Very, very responsive!"

"Very, very integrated!"

Greentree is modular, with all business functions totally **integrated.** This provides you with a wide variety of modules and sub-modules that afford options rarely found in other packages. You purchase the pieces that you need, effectively matching the system to fit your business. Choose from: Financials, Job Costing, Supply Chain & Distribution, Manufacturing, Human Resources, Customer Relationship Management (CRM), Service & Asset Management, Business Intelligence, Retail, Workflow-Business Process Management and eBusiness.

Greentree is a **flexible** solution, readily adapting across a broad range of industries and business types. Businesses are provided with a **powerful,** extremely cost-effective system that has consistently proven itself capable of managing change and growing business potential.

With simple, smart thinking at your fingertips, Greentree provides the ultimate seamless business-building environment. Exploit its accuracy in business metrics, challenge its capability to deliver empowering information. Rely on the one highly **responsive** solution to efficiently streamline your internal processes resulting in increased manageability and productivity across all areas of your enterprise.

What's the difference to any other software solution? Greentree is the most responsive business software product available, providing a source of competitive advantage to help you drive your business to the next level!

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