Biz-Insider

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INSIDER INTRODUCTION

On behalf of the JR.bizlink team I'd like to wish you a warm welcome to this edition of BIZ-INSIDER.

We aim to make our newsletters interesting, succinct and worth sharing. This Christmas circular includes INSIDER 'tips & tricks' from Greentree, a time limited module offer and an Opinion piece from yours truly.

Please do share this edition of BIZ-INSIDER with business colleagues and do Feedback to any member of the JR.bizlink team with your views and suggestions on future topics.

Enjoy the Read & Season's Greetings to Everyone!

Teresa Hooper,
Partner, JR.bizlink

INSIDER OPINION

The GFM delivered a harsh reality check for many businesses worldwide The importance to not just the profitability but the very survival of business of KPI's should not be underestimated says Teresa Hooper, Partner of Johnston Rorke. "I think when it gets tough and they take a really hard look at their business; perhaps they've evaluated for the first time what they really think their offering is, and that gets them focused to go forward. So these sorts of hard times are life lessons, really."

With KPI monitoring in place, businesses are (amongst other objectives) able to streamline processes and enhance productivity. Direct actions include being able to determine whether they should be cutting wages or stock, seeking better buying deals, or moving from permanent staff to contracted, casual labour, etc.

A word of warning though, don't expect to be able to apply any standard formulas to your particular situation. Your product or service offering, the vagaries or your particular marketplace, your location – all combine to produce a unique profile. Nor can all the lessons learned from previous economic crises be applied to a current situation. The answer is we need to assess and prescribe specific to your business and operating environment.

Teresa believes the message is getting through to business "I'm seeing smaller businesses now not waiting for their accountant nine or 18 months after year-end to tell them they did well or badly; they're actually wanting to know if they did good or bad in the last month. In my experience, tracking KPIs can absolutely improve your bottom line."

Read the full article

Contact Teresa for a KPI Consultation

GREENTREE: SEASONAL ENRICHMENT AND ENLIGHTENMENT

• Enhancements • BPM tips • MRP tips • FAQ's

The following are some Enhancements that have been included in Greentree from mid-2011:

- Increased the field length on the inventory location from 4 to 6 characters. (greentree3@44-45.package)
- Webview Integrates new grid features to existing pages and forms including: (greentree3@44-46.package)

- Alters the Financial Reports so a specific report is selected from a sub-menu. (greentree3@44-46.package)
- Option added to create a packing area for Warehouse Bin Management. (greentree3@44-47.package)
- New menu item add under Process | Inventory | Serial/Lot, all serial/lot processes are now under this sub menu. (greentree3@44-54.package)

- Added a process to change the serial/lot number on an AR Invoice. (greentree3@44-54.package)
- PO Shipment receipts can now be reversed. (greentree3@44-55.package)
- A “Total advance receipt payments” value and a “percentage sales order total” are now displayed on the SO Order Entry | Payment Details sheet. (greentree3@44-61.package)
- A “Current advance” field has been added to the SO Advance Receipt Entry form. (greentree3@44-61.package)

WebView Financial Reporting enhancements: (greentree3@45-5.package)

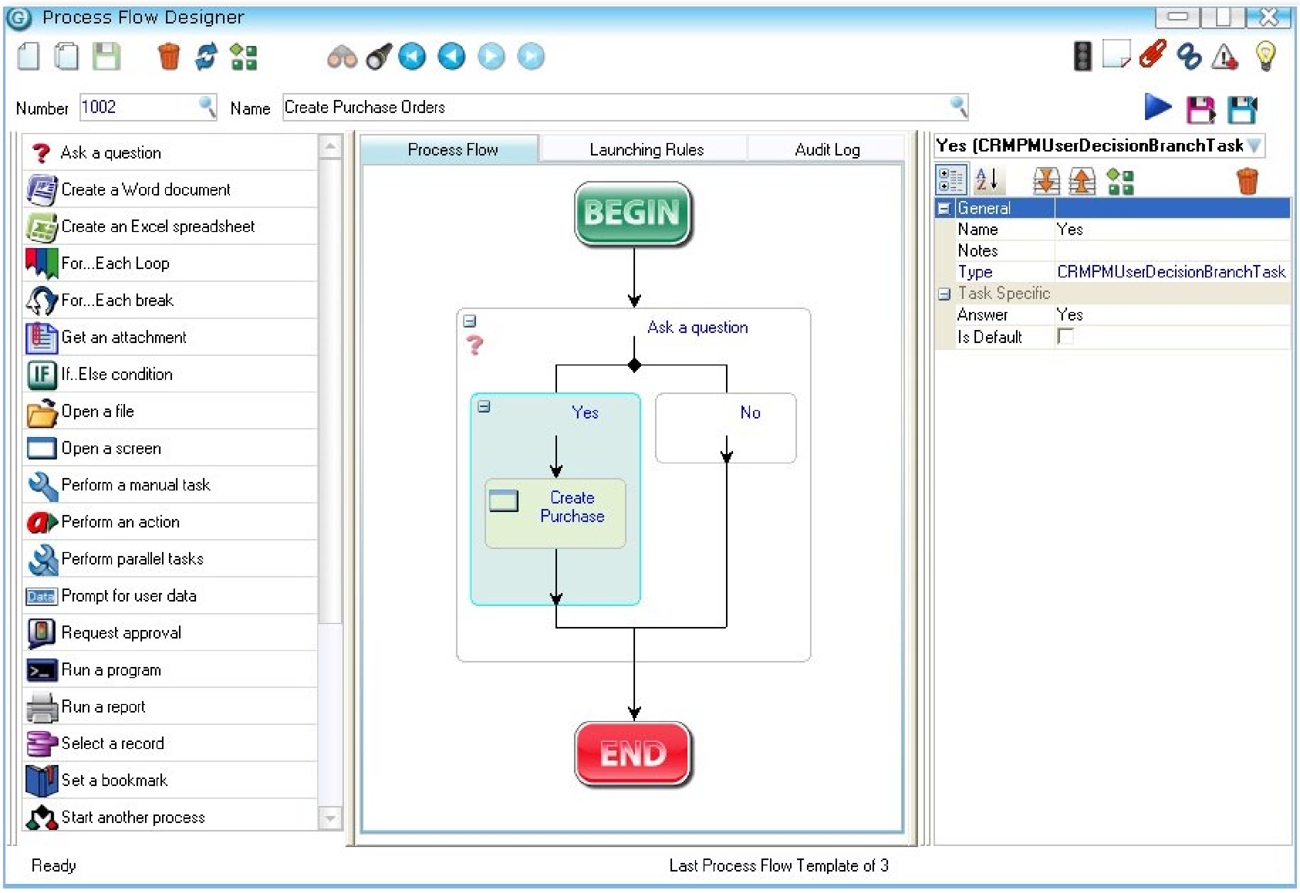
1) In Web Security, on each row where you can specify an account mask, can now enter a company override.
2) In Row Maintenance, a visible checkbox option has been added to each row.
3) In Column Maintenance, calculations can be done using a row/column combination. (eg R10C20).
4) In Column Maintenance you can now add a filter column so you can type in 10.*.* - this would use the tree and branch but then further restrict to the GL accounts matching the mask. This is the equivalent of the Search parameter in gtGLActBal.

[Visit the Greentree area on JR.bizlink online]

Get to know Greentree more intimately with the help of some ‘tips and tricks’:

BPM: When a BPM process creates a document record, the record contains a link to the process. The following illustrates how you can ensure that there is a link from the process back to the record so that you can see what documents have been created during a BPM process run.

Below is a basic BPM Process to create Purchase Orders:



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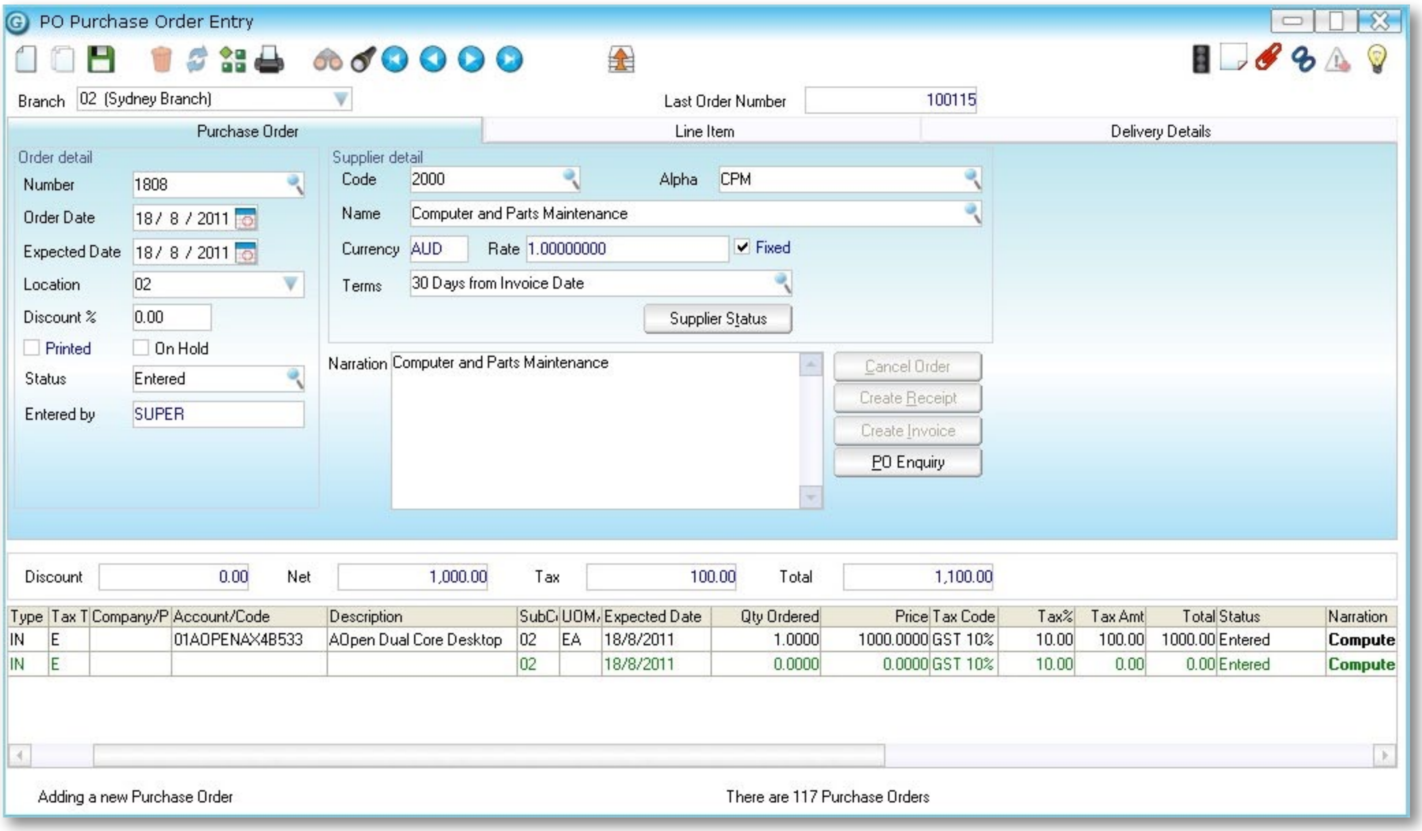
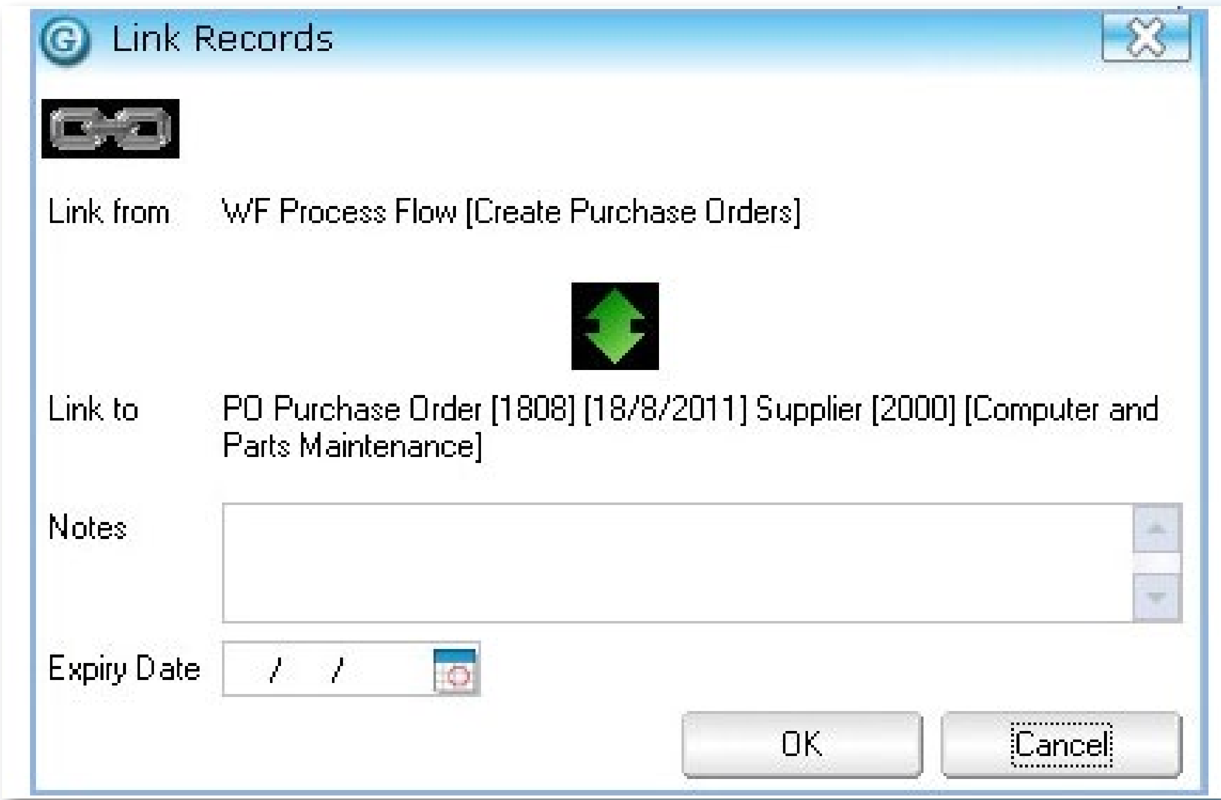
Set the process running and create a Purchase Order:



Save the Purchase order and recall it. Click on the link button at the top right of the screen and this shows that the Purchase order was 'Linked from' a WF Process Flow 'Create Purchase Orders' process:



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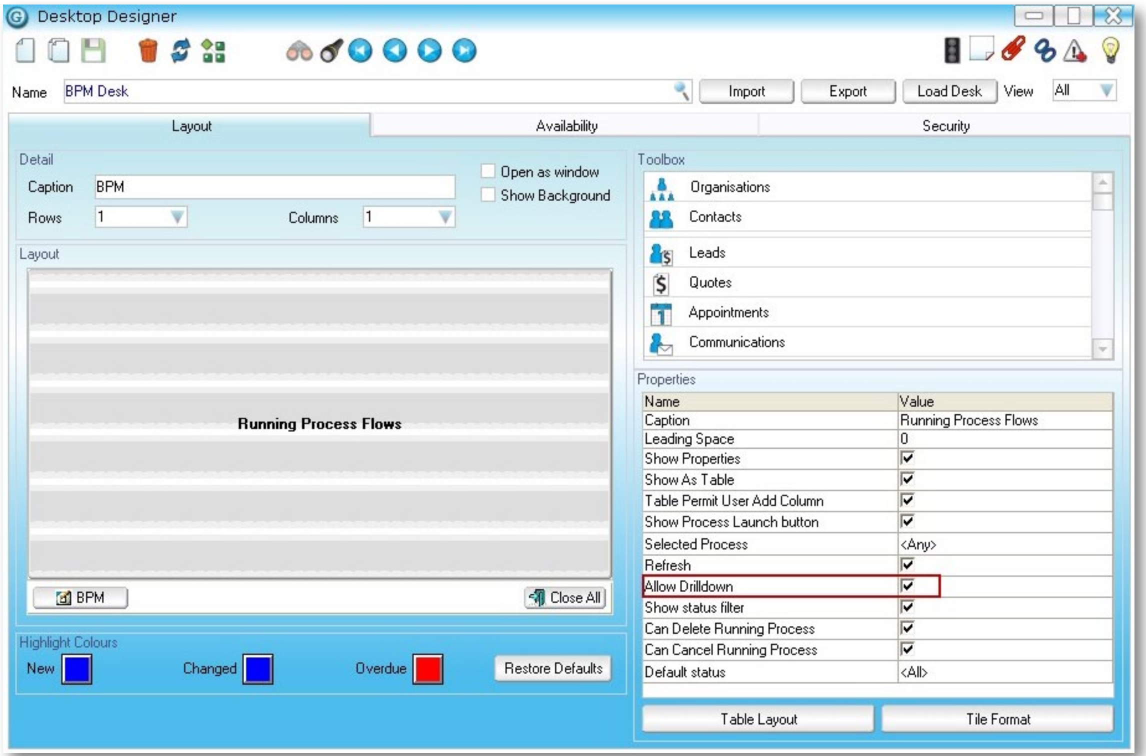
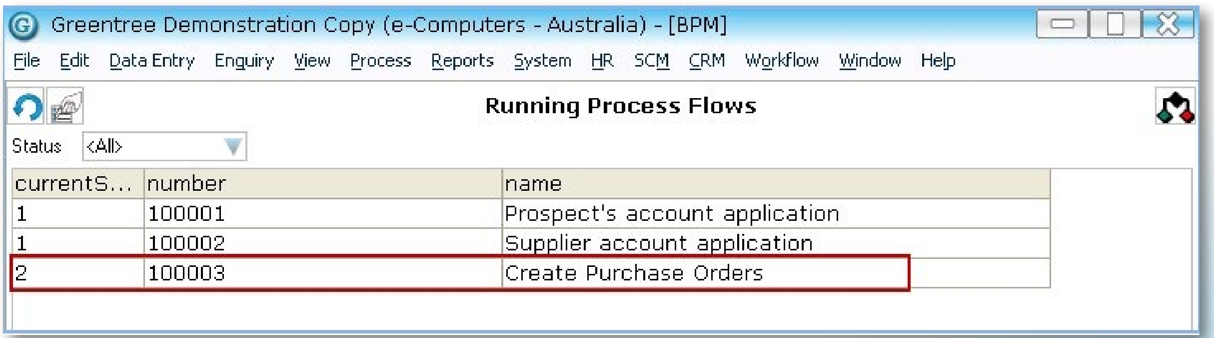
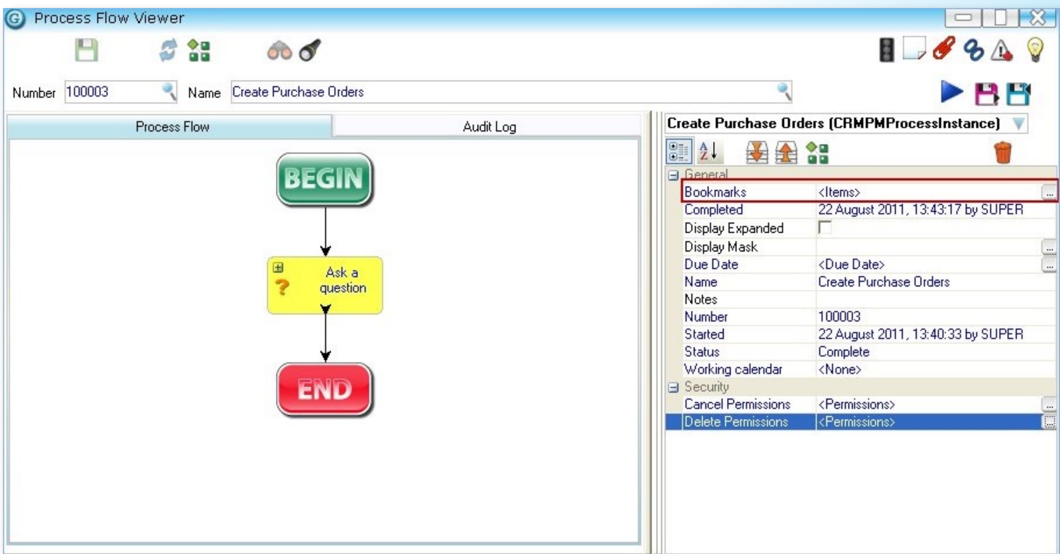
Go to Workflow Desktop and create a desk to view ‘Running Process Flows’. Ensure ‘Allow Drill down’ is set to true:



Go to Workflow | View | Desks and select the BPM desk created above. This displays all the processes that are running:



Drill down on the ‘Create Purchase Orders’ BPM process that was run (eg 100003 above):



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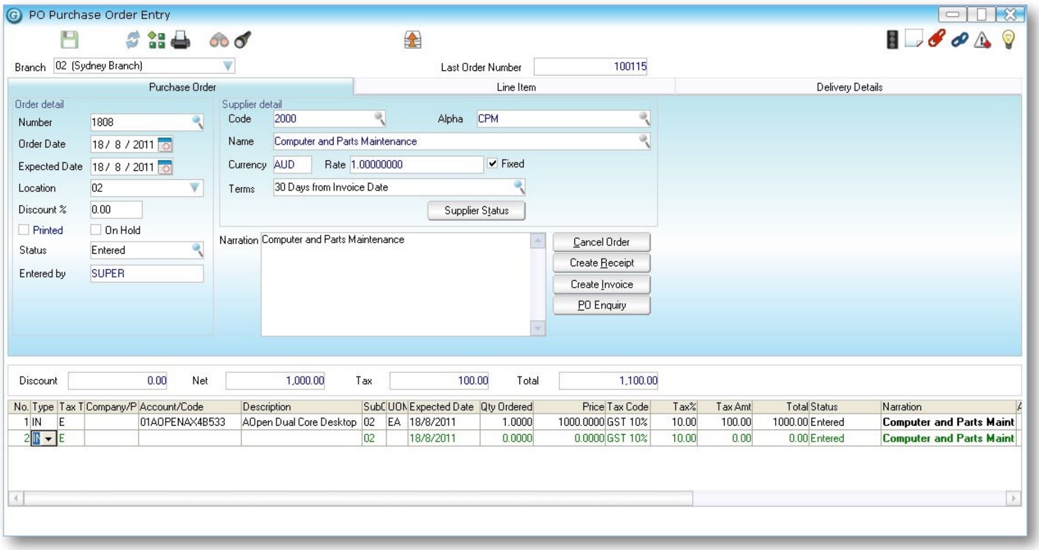
Click the ellipsis button beside the 'Bookmarks' item. This shows the bookmark to the Purchase Order created from this process run:

Double clicking on the bookmarked record allows you to view it:



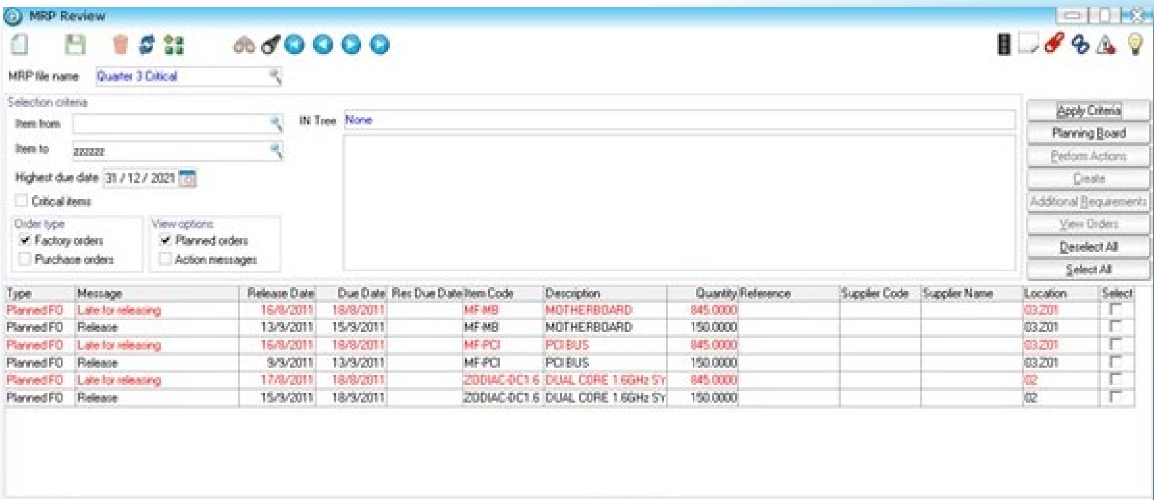
MRP:

Ever been asked the question "Where did that planned order come from?"

On the surface, the MRP Review form can throw up a lot of planned orders and action messages and look rather daunting. The MRP Generation process performs a lot of background calculations based on various combinations of inventory, purchase orders, sales orders, forecasts and bill of materials.

So when a planned order is suggested how can I easily tell what created that demand?

On the MRP review form, double click on a line and all will be revealed:



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The source information form displays the MRP generation details:

MRP Planned Order Source Information

ZODIAC-DC1.6 (DUAL CORE 1.6GHz SYSTEM)

Due date 18/9/2011	EA	☐ Is forecast on the date
Forecast quantity	N/A	
Sales quantity	150.0000	
Gross quantity	150.0000	
Quantity for Kitset	0.0000	
Quantity for FO parent	0.0000	
Receipt quantity	0.0000	
On-hand quantity	0.0000	
Minimum balance	0.0000	
Net requirement	150.0000	
Batch size	1.0000	
Planned FO	150.0000	
Projected on-hand	0.0000	
Lead time	8.00	hours
Release date	15/9/2011	

On hovering over any of the quantity values and you see a Double click for details pop-up, this signifies that you can drill down even further to see what is causing the demand.

For example double clicking on the Sales quantity value of 150 displays the Sales Quantity Source Information:

Sales Quantity Source Information

Document Date	Reference	Code	Name	Location	Stocking Qty	Date Required	Status
18/9/2011	500041	1000	Kangan Education	02	75.0000	18/9/2011	Order Confirmation
18/9/2011	500042	1001	Highstone High	02	50.0000	18/9/2011	Order Confirmation
18/9/2011	500043	1002	Willers Primary	02	25.0000	18/9/2011	Order Confirmation

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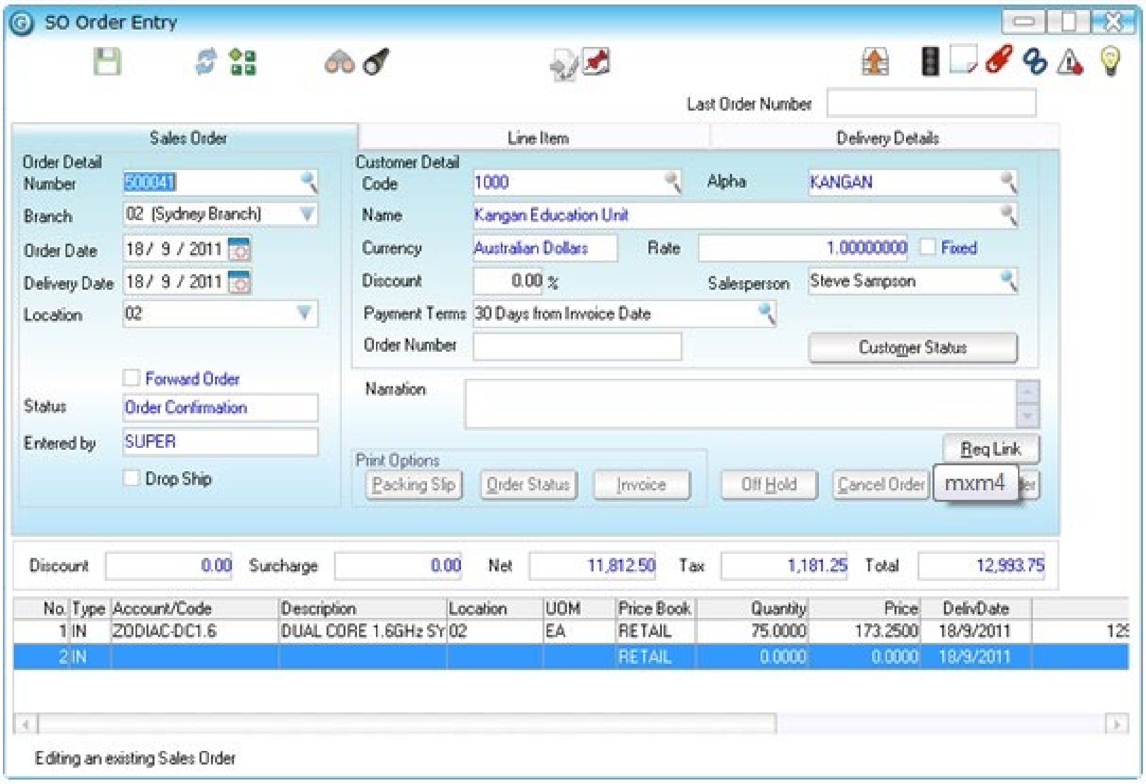
Drill down again on a Reference to display the individual sales order:



[Visit the Greentree area on JR.bizlink online]

The following are some Greentree FAQ's:

CRM Quotes

Question: Is there a way to create a lead against one organisation then link multiple quotes back to it with each quote being created for a different organisation?

Answer: Access the "master" quote in Quote Maintenance then use the 'Copy' icon and change the 'Organisation', 'Contact' etc prior to saving the copied record.

Inventory

Question: The site wants to create a location AAA.BBB.100, however location AAA.BBB is set to hold inventory and the system doesn't allow us to create a lower level location to hold inventory as well. Is this possible?

Answer: It is not possible to hold inventory at two different location levels eg. AAA.BBB and AAA.BBB.100. Running "IN Change Stocking Levels" from the Process | Inventory menu will allow stock to be moved to a lower (or higher level). An alternative, would be for the site to use WBM.

Payroll

Question: It is possible to enter both Reducing Deductions and Reducing Payments. What is the difference between these and when would each be used?

Answer: Reducing Deductions are for one-off amounts of money coming out of the pay over a specified period, for things such as court fees, fines etc. Due to the fact that Authorities can be set up and the Deduction TT assigned to the Authority, reports can then be obtained from HR Authority Report and Transaction Type reports. Authority export files can also be created for sending to the Authority, This is the recommended approach where traceability of the deduction is required.

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Reducing Payments on the other hand are simply a method of distributing the net pay. This can be done into various bank accounts and included in the Direct Credit file. The downside of this option is that there is no reporting/traceability as part of the standard reporting. It would be possible to write a report based on all Payment Lines where bank Account No is equal to the account the payment is going to, as well as other filtering criteria if required eg date range, employee etc.

Question: The client is attempting to run a pay in the test system to verify values against their old Payroll system. The Tax is not calculating even though Tax Codes have been imported and assigned to the employee correctly. What could be causing this?

Answer: The Weekly and Annual Conversion factors need to be set on the Pay Group the Employee is assigned for the Tax to calculate eg. for a Weekly Pay Group - set to Weekly=1 and Annual=52.14 (this is entered to two decimal places for greater accuracy but can be left as 52), for a Fortnightly Pay Group Weekly = 2 and Annual = 26.07, for a Monthly Pay Group Weekly = 4.3333 and Annual = 12.

Question: Job lines for an employee are not defaulting to the pay however the rate is set to true. Why is this?

Answer: If a Pay Transaction type with a Qty of 0 has "Rate" = true, it will not default through to the pay. The reason is that it assumes it is there for the purpose of obtaining a rate. You need to have a quantity other than zero entered for this to default, or the rate needs to be set to false.

S&S/WF - Service Planner

Question: Is it possible to colour code the CRM Service planner for items other than the Service Type eg, Location?

Answer: Currently we have 5 'hard coded' data providers (JC Jobs by: Parent, Employee, Account Manager, Job Manager, and Service Requests by JC Employee) and colours are only available for Service Request types. The rollover text can be user defined to include the location, so that when hovering the mouse over the Service Requests, it can be seen.

[Visit the Greentree area on JR.bizlink online]

WEBVIEW

- Solution Spotlight
- Special Promotion

Solution Spotlight: WebView

Making the right decisions is always easier when you're in the picture. But with today's complex systems it's not always possible to give everyone who should have information easy access to the data they need. Location problems, permission issues and simply making sense of complex information can all make it difficult for users to get the full picture. And not having access to accurate and timely information can make the difference between succeeding and failing in today's challenging, fast-paced markets.

Greentree's WebView puts you in charge with a powerful and flexible browser based information publishing engine that empowers anybody with permission to access and view the information they need from within your Greentree system. A clear, intuitive web browser interface makes it quick and easy to train any user. Take advantage of the full integration with Greentree's entire business solution.

Key Benefits:

- Drill into your business information from anywhere
- Organisation-wide productivity improvements
- Extremely powerful information access
- Proactive partner relationships

[Read the Greentree WebView Product brochure]

[Contact us for a WebView Consultation]

Special Promotion: WebView

What better way to empower your staff, customers and suppliers than putting information at their finger tips through Greentree's WebView modules!

WEBVIEW

Try before you buy!

Try out the WebView's Starter Pack FREE OF CHARGE until the 23rd of December 2011…

Then, Purchase a WebView Starter Pack and pay only $3,000* (- 50% discount off the normal retail price!). The WebView Starter Pack includes Designer and Financial Reporting modules + 5 WebView users for each module. Subject to 1st year Greentree maintenance and ongoing maintenance renewal - based on the normal retail price of the software.

Act quickly as the offer ends 23rd of December 2011.

Contact us for a WebView Consultation

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