

# WORKFLOW

BUSINESS  
PROCESS  
MANAGEMENT

WORKFLOW  
DESKTOP

DATA  
IMPORT  
MANAGER

AUTOSCAN

APPROVALS  
& ALERTS

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DATA  
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DESKTOP

## Key Benefits

- Enhanced import capability
- Improved productivity
- Import integrity
- Customised import function
- Automated email notification
- Automated task scheduling
- Full audit trail with drilldown
- Comprehensive error reporting

Traditionally data file importing from disparate or legacy systems has proved a headache for managers with time-consuming running and rerunning of scheduled imports, errors and limited ability to manipulate data. Greentree has an intelligent interface tool that allows for fail-safe data integration and consolidation.

Data Import Manager for Greentree automates data file imports from non-integrated systems. The interface manager has an advanced Workflow functionality that allows users to schedule regular imports of both master files and transactions including invoices, orders, receipts and journals as well as a myriad of master record types. The format of the imported data file can be configured within Greentree thereby eliminating program changes and providing a flexible platform rather than a rigid fixed format. Of course all imported data is processed through Greentree's business rules to ensure that it is both consistent and valid.

Data Import Manager for Greentree allows administrators to manage the integration of data into Greentree with a number of powerful tools to maintain, schedule and view the data transfer process effortlessly.

## Enhance your data import capability

Companies produce a variety of data in a variety of forms across their network and systems, which may or may not be fully integrated. Additionally, companies often receive data from third party external sources which must be imported into their accounting and business systems. Easy access and integration of this information is critical to the efficient and accurate processing of data, but can be problematic for many organisations.

Data Import Manager is a flexible tool that lets users choose single or multiple files to import, specify file types, define, create and assign new file directories and names, import attachments and save log files from one user-friendly screen.

“Greentree allows us to integrate all areas of our business in a way that we would not have expected possible in a product aimed at SME’s.”

David Goodwin, Group Financial Controller, The PA People

## Improve productivity

Data Import Manager can improve your organisation’s productivity with fast access to non-integrated data for processing. The Import Manager also allows users to schedule regular imports of data automatically, decreasing the amount of time employees devote to the task of importing and integrating data. Automatic email notification will inform staff on success and completion of import activity with log files if required. Scheduled import progress can be easily monitored at any time.

## Be confident imported data is accurate and consistent

Options are available within Data Import Manager to manage error warnings and logs, with the ability to define the error threshold settings and abort import on reaching the error limit to maintain the integrity of imported data. Your company can be confident that imported information

is accurate and consistent with company defined standards. Users can receive email notification of any errors in data import with the attachment of any relevant log files.

## Customised import function

Staff can customise data import requirements to suit company templates and manipulate information through translation tables before import into Greentree data fields. This allows for the elimination of unnecessary data pre-processing and ensures that company standards for information documentation and storage are maintained ensuring consistency across the organisation.

## Complete audit trail of import activities

Data Import Manager provides a complete audit trail of data import activities. Users can check all imported transactions and review individual schedules, notifications, logs and linked records.

## Import Microsoft Office Word® and Microsoft Office Excel® documents and images

Data Import Manager allows for Word documents, Excel documents and graphical images to be imported and linked to records within Greentree.

## Data Export

Users can export certain key master file data to allow third party systems to validate their own data prior to sending data to Greentree. The Interface Setup allows a flexible choice of what and when the data is to be exported.

## INTEGRATION WITH OTHER GREENTREE MODULES

Greentree’s modular system builds upon and integrates with all other modules to ensure that every drop of business intelligence is extracted from every transaction right across the business – nothing goes to waste. This translates into aggregated business value and you need only purchase the modules that best fit your business.

Data Import Manager integrates with core Greentree modules to optimise data resources ‘live’ environment.

## Data Import Manager integrates in real-time with most Greentree modules including:

- Financials Management
- Job Costing
- Supply Chain & Distribution
- Customer Relationship Management



“The new functionality we have in Greentree has opened our eyes to how we do things. We have seen significant productivity gains using Greentree and in fact saved one day a week for one team member in this area.”

**Andrew Neville**, Manager of Finance & Administration,  
Centacare Catholic Family Services

## KEY FEATURES

### Interface maintenance

Interface maintenance is an easy-to-use, highly configurable function that allows the user to establish extensive parameters that can be applied to data files for import. The screen makes it easy to customise import requirements and specifications for timely and accurate record integration.

### Automated email notification

Data Import Manager for Greentree gives the user the ability to send automatic email notification to specific staff on success, warning of error on data file import and allows for the attachment of import and log files with the email notification.

### Automated task scheduling

Data Import Manager supports user-defined settings to schedule routine import tasks to run automatically freeing managers from time consuming manual administration. The automated scheduling process helps streamline the data import process and increase workflow efficiency.

### Data mapping

Data Import Manager has a data mapping function so it does not rely on a fixed format. It provides translation of actual data values during import.

### Review log

The Data Import Log is a powerful enquiry utility to review all scheduled task summary information. The log allows users to review transaction type, name, status, date and time of scheduled task, errors, warnings, value and user and to review individual schedules, notifications and linked records.

### Reporting of data imported

Each data type has an associated report, which is fully user customisable. This allows end users to print a report of the data imported for audit and reconciliation purposes.

### Secure information transfer environment

Data Import Manager for Greentree respects standard user database validation rules and user security functions, restricting the transaction types and masterfiles that can be accessed for import and export schedules.

# WHY GREENTREE?



## **MANY SOFTWARE PACKAGES COME WITH ADD-ONS, COMPROMISES AND HALF-HEARTED SOLUTIONS.**

Greentree believes you need the reassurance of business software that is both comprehensive and integrated, breaking down barriers and powering you to get on with business.

Responsive and flexible, Greentree provides you with a wide variety of modules and sub-modules rarely found in other packages. You switch on the pieces you need, effectively matching the system to fit your business. As your business evolves, Greentree grows with you.

Exploit its accuracy in business metrics; challenge its capability to deliver insightful information. Greentree eradicates long, complicated tasks and effortlessly manages change, to help grow business potential.

Whatever the need, Greentree gives you choices that are cost-effective and proven. Thousands of companies, large and small, have at their fingertips Greentree's simple, smart thinking that empowers better decisions, better prospects.

And, with a partnership network that spans many countries, Greentree is totally accessible. Your unique needs will drive the way Greentree and its partners respond to you. If the only thing missing from this equation is your business, then get in touch – after all, three heads are better than one.

## **GET READY TO BE PRIMED FOR BUSINESS.**