

Customer success story
The Publishers Association

Industry 
Professional Services

Location
United Kingdom

Greentree product suite
Financials
General Ledger
Purchase Orders
Screen Customisation Manager
eReporting
eApprovals

Greentree business partner
Prerogative

PUBLISHERS ASSOCIATION'S EFFICIENCY GAINS

BUSINESS BENEFITS

- Excel integration allows data to be extracted from Greentree and automatically populate spreadsheets for easy manipulation and analysis, reducing report production from days to hours.
- The elimination of duplicate data handling improves the accuracy and integrity of organisational data. This gives peace-of-mind assurance to management that reporting can be relied upon for decision-making.
- Electronic Banking has eliminated the need to produce hundreds of cheques each month, saving hundreds of hours of staff time and significantly improving the efficiency of the payment process.
- E-approvals will reduce the delays involved in getting authorisation for over-limit invoices.
- Exporting the online payments data out of Greentree directly into the banking system will enable the PA to realise the true operational efficiencies of a fully automated end-to-end banking and payment system.

A challenge to the status quo helped uncover Greentree's remarkable potential for efficiency gains at the UK's largest representative body of publishing industry participants.

Business situation

The Publishers Association (PA) is the leading trade organisation serving book, journal and electronic publishers in the UK. When Mark Wharton, Director of Operations, joined the organisation a year or so ago, he brought the value of a fresh pair of eyes. After getting to grips with the time-consuming and convoluted process of manually extracting figures from numerous spreadsheets before he could produce a report, he was convinced there must be a better way.

Although the PA had been Greentree customers for several years prior to his arrival, Mark was certain that the organisation had barely scratched the surface of Greentree's true capability. "I was aware that we had essentially implemented Greentree to help us automate several key processes, but we hadn't actually figured out the necessary process changes required to make it happen. I could see Greentree provided huge scope to achieve this." To help discover more of what Greentree had to offer, he called upon the expertise of the local Greentree Business Partner, Prerogative.

Integration will save three days' admin a month

Mark's first task was to seek salvation from manually extracting data and re-entering it into various spreadsheets before he could produce reports for scrutiny



"The consulting team at Prerogative provided expert knowledge about how we could get the most out of Greentree's integration with Excel. They've provided one-on-one staff training which will give us the in-house expertise required to automate the reporting process."

Mark Wharton, Director of Operations,
The Publishers Association



by the board of directors. It was a revelation to discover that Greentree's Excel integration allowed for the extraction of data out of Greentree with the automatic population of Excel spreadsheets. Data could be manipulated and analysed as required, before being exported and mapped to a pre-defined report format. Mark envisages that the efficiency gains will be huge and Cleo Pierre, the PA Finance Manager, expects that once reporting is set up correctly, data handling and report production will be reduced to hours, saving three days each month.

Improved data integrity translates into accurate reporting

Mark also expects the accuracy and integrity of organisational data will be greatly improved. This means management and directors will have the peace-of-mind confidence in the reliability of reporting information for decision-making. This initial reporting revelation provided the catalyst for further investigation into what else could be achieved within Greentree.

Electronic banking and e-approvals deliver online efficiencies

The discovery of Greentree's online banking capability has presented an opportunity to look more closely at how the PA is performing in other

key operational areas. Previously, hundreds of hours of staff time were consumed writing cheques, reconciling bank statements and chasing approvals, un-presented and lost cheques each month. The PA payment mandate also required payments above a pre-determined limit be authorised by an internal staff member and a director or board member. This often required cheques to be couriered to various locations and back again.

Implementation of Electronic Banking immediately removed the need to write hundreds of cheques and, once the current version of Greentree has been upgraded, the e-approvals module will allow over-limit invoices to be scanned and emailed to the appropriate person for authorisation. Obviously, this will reduce the administrative time absorbed by the payment process, but Mark is keen to take things a step further by exploring the possibility of exporting the online payments data directly out of Greentree into the banking system.

Mark is convinced that by streamlining the electronic banking and payment systems from end-to-end, the true potential of Electronic Banking efficiencies will be fully realised. He expects the cumulative impact of the time and cost savings on the bottom line will be thousands of pounds yearly.

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THE PUBLISHERS ASSOCIATION

The Publishers Association (PA) is the leading trade organisation serving book, journal and electronic publishers in the UK, and provides a strong voice for the industry in government, within society and with other stakeholders in the UK, in Europe and internationally. They also provide a forum for the exchange of non-competitive information between publishers and providing support and guidance to the industry through technological and other changes.
www.publishers.org.uk

PREROGATIVE

Prerogative, which (including last year) has been consecutively awarded International Greentree Partner of the Year, is the UK's most experienced Greentree reseller. With its vastly experienced implementation team, it has an outstanding record of successfully implementing systems across a wide range of sectors in the small to medium sized business arena. Combined with first class support and a commitment to the ongoing relationship with its customers, Prerogative continues to add value to its clients.
www.prerogative.co.uk

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