



CUSTOMER:
EnergySmart Ltd



INDUSTRY:
Charitable Organisation



LOCATION:
Lower Hutt, New Zealand



PRODUCT:
Greentree

“Our previous software didn’t have the capability to break costs down by branch. Greentree allowed us to do this, and that makes stock taking and reconciliation by branch possible. We also needed budgeting capability and reporting at a branch level, which was not available in the earlier solution.

MIKE SLAPE – Corporate Services Manager

SCENARIO

EnergySmart expanded from its origins as a small, family business to a national organisation when it was acquired by the Hutt Mana Charitable Trust in 2006. Rapid expansion and a greater commercial focus led to a need to upgrade the organisation’s financial systems, and establish a robust and integrated ERP solution.

REQUIREMENT

EnergySmart was faced with a need to upgrade its IT solutions as it grew from a small family business to a national operation. The solution needed to be affordable and capable of handling the diverse needs of a growing business with operations at eight locations throughout New Zealand. It also needed to be easy to use, support multiple inventory locations, and provide easy integration with external data in Microsoft Office formats; in particular Excel and Access.

EnergySmart is a charitable company that has been helping New Zealand families, in the words of its motto – “Live Warm and Live Smart” since 1997. It has been installing energy efficient solutions and providing energy efficiency advice for over 12 years. With the main office in Lower Hutt, it has branches in Hawkes Bay, Wairarapa, Manawatu, Nelson, South Canterbury, Otago and Southland. There are warehouses in the branch locations, making it important to coordinate the ordering and management of inventory around the country.

Greentree provided a modern platform, enabling EnergySmart to take advantage of new technologies and improve its business processes. Implementation needed to be flexible, and capable of meeting the demands of intermittent availability of EnergySmart personnel and a staged delivery.

SOLUTION

The solution put in place was Greentree business software, and the provider was Enabling. The first module that needed to be installed was the Greentree Financial Management package, which is the cornerstone of the suite. It provides a robust, reliable and secure financial system that works on Microsoft Windows. It provides the essential accounting functions and the ability to easily create a variety of sophisticated financial reports. Payables and Receivables were implemented in July, 2009 to kick off a progressive implementation which extended into 2010.

ABOUT ENERGYSMART

EnergySmart, founded in 1997, is a charitable entity, fully owned by the Hutt Mana Charitable Trust. It is one of New Zealand’s leading providers of energy efficiency solutions to the residential market. It has more than 120 staff in 8 locations throughout the country, and its goal is to enable the supply and installation of simple but effective energy efficient solutions to New Zealand households.

By working closely with a range of community and government organisations such as local councils, the Energy Efficiency and Conservation Authority (EECA), local District Health Boards (DHBs), and Charitable Trusts EnergySmart can service both general income customers as well as providing free or heavily subsidised home insulation for people who are on a low income, and/or have health-related conditions such as asthma.

EnergySmart has specific staff to handle client liaison, energy assessments, project management and delivery, and quality control.

ABOUT ENABLING

Enabling is the recognised leader in the provision and support of business management applications throughout Australia and New Zealand, especially in the areas of technical and development expertise, solution design and long-term customer service. With offices in Melbourne, Sydney, Brisbane, Auckland, Wellington, Christchurch and Dunedin, we have both strength of numbers and depth in expertise to support organisations of all sizes and with a multitude of requirements. Enabling is one of the largest installers of the Greentree system, and offers a total service solution.

ABOUT GREENTREE

Greentree International is a New Zealand company that specialises in developing effective financial and business management software for medium sized enterprises. For over 20 years, Greentree products have been implemented by the company's extensive Business Partner Network, enhancing the operations of more than 10,000 organisations in Australia and New Zealand. The Greentree solution is a powerful yet simple, easily customised, cost-effective business system that is flexible enough to grow. It is a real-time, modular, integrated business management suite, purpose-built and well-matched for Australasian small to midsize businesses. With a Windows-based user interface, Greentree provides seamless integration with Microsoft Office, delivering comprehensive functionality within a familiar operating environment.

SOFTWARE CHOICE

Greentree Business Software.

Greentree has a strong line of integrated modules that include:

- Financial Management
- Supply Chain and Distribution
- Job Costing
- Manufacturing
- Customer Relationship Management
- Service and Asset Management
- EBusiness
- Human Resources
- Retail
- Business Intelligence
- Information Access and Reporting
- Mobile Solutions

Of particular interest to EnergySmart were the Financial, Supply Chain and Distribution, Customer Relationship Management, and Job Costing modules, all of which offer the prospect of integration with the organisation's internally developed Excel spreadsheets and a Microsoft Access customer database.

"Implementation took a staged approach, and we had to manage the project," says Slape. "This was because we were under-resourced to take on the transition, with different people available at different times. Delays were to be expected, but Enabling was able to adapt to an intermittent schedule."

In addition to the main modules installed, EnergySmart needed some customisation, including reports and routines for handling GST reporting needs.

RESULTS

"Enabling worked around our requirements exceptionally well," says Slape. "This was particularly important. They were able to make people available, and accommodated our business timing."

EnergySmart has seen dramatic improvement from the previous solution, and is now able to move forward both in software and in business processes to meet the needs of a rapidly growing enterprise in a fast changing business environment. Ease of use, and ability to get up and running relatively painlessly have proven important. Integration of the product and the availability of numerous modules has made it possible to plan for future enhancements. The ability to import data such as journals and budgets from Excel spreadsheets provided both flexibility and ease of use as the implementation went forward.

"Greentree is a significant improvement on what we had, and we couldn't have done without it," says Slape. "Budgeting, inventory by location, and ability to establish cost centres have all provided substantial benefits. One of the real bonuses has been the improvement in inventory management. Reporting is fantastic, and the capability to drill down for specific information and export to Excel for further analysis is extremely useful."

FUTURE

With the Greentree solution now in place, EnergySmart can look forward to further improvements in its operations and greater efficiencies. It will be able to meet the needs of rapid growth, and aid an every increasing clientele in their attempts to "Live Warm and Live Smart".

"Future enhancements will be around Payroll and Human Resources," says Slape. "We need to simplify things and make some refinements to our processes first. We also have plans to improve our customer database and extend its integration."

For EnergySmart, Greentree has been a winner. And Enabling has been the reliable provider with the capability to make the solution possible.

"Enabling's depth of experience in implementation proved to be critical to getting the solution in place over a relatively lengthy implementation period, and facing special requirements. They go the extra mile to ensure that what needs to get done, gets done."

MIKE SLAPE – Corporate Services Manager

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