

# MYOB Greentree

Client CLL Service & Solutions | Location New Zealand  
Product MYOB Greentree | Industry Construction & Engineering



## Greentree ERP tackles big projects

CLL Service & Solutions is a large civil contracting company that undertakes major projects throughout New Zealand. They include roads, railway infrastructure, and residential and commercial buildings. Some of CLL's projects will take years to complete and are worth millions of dollars.

### Problem

#### Analytics lacking in dated systems

It's a familiar story: the business grew rapidly and project management became increasingly complex, taxing its legacy business systems. Its search for an integrated solution that could monitor projects in real time, as well as manage fixed assets and revenue recognition, led CLL to MYOB Greentree.

"We are a jobbing business, and to be able to understand profit and loss for each job is crucial, to analyse what has gone both right and wrong," explains CFO, Jeniya McCarthy. "We were using jobbing software created by a small company, which enabled us to report on jobs, but it didn't have revenue recognition. The system was quite complicated to use and to find information."

The legacy payroll system was not NZ-compliant because it couldn't track sick leave; correctly paying its large team of specialists, along with numerous sub-contractors, was a constant headache for CLL.

Then there was the costly matter of fixed assets: CLL maintains a large workshop to service its heavy equipment, and the use of that equipment needs to be billed to each project. Scheduling of maintenance was a problem because there was no proper visibility of the usage of each machine. All of this was costing CLL money.

Accounting and approvals were handled by separate systems, and the processing of 30,000 invoices a year made for loads of manual labour and paperwork.

"We had managed to get the systems to communicate, but there was still that separation, which meant we were spending too much time checking that invoices were correct," Jeniya says.

**"To be able to understand profit and loss for each job is crucial."**

### Solution

#### Work in progress made visible

Jeniya went looking for an integrated business system that could provide that much-needed live view of jobs in progress and all the associated costs. A Google search brought up Xero, Microsoft Dynamics NAV, and Greentree. Jeniya concluded that Greentree would be easier to adapt for present and future needs, but it was the Greentree Partner's approach that sealed the deal.

"I needed someone I could trust to do the job. We needed to have payroll up and running from the outset, and their experience with payroll was really important to me."

A special screen was designed by the Greentree partner so that work in progress is detailed automatically for each job. Greentree's Approvals & Alerts was also specially configured so that either account or job managers can make approvals.

Greentree eDocs enables line-level data extraction from complex invoices, so exact billing can be done for plant and materials on every job.

**"The Greentree Partner's experience with payroll was really important to me."**

## Outcome

### A better view for everyone

“Greentree’s reporting is brilliant,” Jeniya enthuses. “Now I can see all the expenses of each division in the company and consolidate the data between them. Greentree’s financial reporting engine (FREE) makes it really easy to feed data from Greentree into the report I want to see and it updates at a click.”

WebView enables project managers in the field to view their jobs, approve expenses and manage their costs remotely. Jeniya also believes that Greentree’s analytical capabilities are saving money.

“Previously we couldn’t put the pay rates in to see whether we were recovering the overheads on jobs. Now we can see what we’re really charging, which will flow back to our tender estimates.”

In the workshop, the use and performance of every fixed asset is now visible, so customers can be billed correctly for plant usage. Approvals & Alerts ensures that maintenance is always carried out.

Greentree has made Jeniya’s job much easier. “Instead of just sitting looking for errors or trying to find invoices I’m doing more value-added work. The ease of use is amazing – payroll is compliant, and everything works perfectly together.”

CLL is focused on becoming a Tier 1 company, and as it learns more about Greentree’s capabilities, it knows it’s equipped to achieve that.

“I now have proper visibility and reporting,” Jeniya concludes. “I can run two companies at a time and consolidate them, and I can put budgets in and measure performance each month against the budget.

“Greentree does everything I wanted it to do.”

**“Greentree’s reporting is brilliant.”**

Before	After
+ Poor visibility of costs	+ Live view of every project
+ No proper asset management	+ Assets tracked in real time
+ Revenue recognition lacking	+ Revenue reporting instantly available
+ Non-compliant payroll	+ Payroll fully compliant
+ Too much paperwork	+ Electronic document management
+ Time wasted checking invoices.	+ Proper approvals process.