GreenTree's Phase Out – The Challenges and Opportunities

Insight Report

Introduction

You've probably been using **Greentree** for a long time, and while you didn't ask for this end-of-life transition, it's now a problem you've inherited. And once you start thinking about upgrading, you quickly realise it's not the only challenge on the table. Your **ERP** has always kept the operational wheels turning, but it hasn't made it easy to grow sales.

Getting meaningful reports on account performance can be painful, and the system certainly isn't tapping you on the shoulder when a key customer reduces spend or stops using part of your range. Your reps are busy, some may have even asked for **CRM**, but without tight integration to Greentree (or anything else), they're not getting the sales intelligence they need to focus their efforts where it matters most.

That's where **SugarCRM**, delivered and supported by **Optimate.me**, steps in.

SugarCRM provides a next-generation CRM platform that connects seamlessly with ERP systems, including both **Greentree** and **Acumatica** through **OptiSync**, Optimate.me's purpose-built integration engine.

Your ERP keeps the business running.
SugarCRM keeps it growing.

Who We Are

We're **Optimate.me** – experienced CRM consultants and automation specialists based here in **Australia** and **New Zealand.**

Unlike dealing with offshore support teams, we've got boots on the ground, and we've helped **500+** companies scale their customer experience operations with tailored, best-of-breed cloud software solutions.

The Problems Most Companies Face

Businesses relying on legacy systems like GreenTree aren't just dealing with technical hurdles, they're dealing with challenges that quietly drain productivity, limit growth, and create constant pressure on their teams.

These issues show up in different ways, but they all point to the same core problems holding companies back.

Your Workflows are Outdated

- Old workflows are rigid and don't reflect the way your teams actually operate
- CRM projects often reveal fragmented, inconsistent, or undocumented workflows
- Customisations from years past create rigid logic that can't easily adapt

Your Systems are Fragmented

- Customer conversations are scattered across email, phone, chat, and spreadsheets
- Real-time syncing for pricing, inventory, and order data becomes difficult
- Legacy ERPs struggle to integrate with modern tools

Your Data Isn't Reliable

- Duplicate and incomplete records create confusion and rework
- Important history is lost in old fields, custom logic, or manual notes
- Customer records differ between ERP and CRM systems due to mismatched fields or sync failures

Your Missing Critical Insights

- Legacy ERPs provide weak analytics and dashboards
- Limited Visibility makes forecasting and pipeline management difficult
- Reporting is limited, outdated, or slow to produce
- It's hard to spot trends, risks, or changing customer behaviour early
- Sales can't easily see inventory, delivery timelines, or invoice status

How We Solve This

ERP-driven organisations commonly struggle with fragmented processes, outdated workflows, poor data visibility, and weak user adoption.

Optimate.me solves these challenges with **SugarCRM**, **OptiSync**, and our purpose-built **Account Growth Suite**, transforming siloed systems into a unified, scalable customer platform.

1. Real-Time, Cost-Effective ERP Integrations

Traditional ERP integrations are slow, batch-based, expensive, and lack modern APIs. This leaves your team blind to real-time pricing, inventory, and order updates.

With **OptiSync integration** you can:
- Give every account manager a full 360° customer view without needing to access complex ERP screens.
- View live ERP data including invoices, order history, balances, and credit status - directly within SugarCRM.
- Keep sales, service, and finance teams aligned with accurate, up-to-date information.

2. Modernising Sales Workflows

Traditional ERP-driven processes often leave sales teams stuck with fragmented workflows, incomplete customer histories, and limited forecasting visibility.

With our unique **Account Growth Suite** your team can:
- Stay on top of every account with automated follow-ups and territory-based scheduling replace inconsistent manual steps.
- Work smarter in the field with mobile connectivity to capture notes, outcomes, and next steps immediately without the need for back-office catch up.
- Access improved management visibility with the ability to track activity, visit coverage, and performance across teams - at a glance.

3. Meaningful Insights for Informed Decisions

Legacy ERP systems make it difficult to extract meaningful insights, resulting in poor reporting, lack of visibility into buying trends, and lost sales opportunities.

With SugarCRM's **Sales Intelligence** your team can:
- Instant visibility into buying patterns to identify when customers stop ordering, reduce spend, or show signs of churn.
- Get proactive alerts for cross-sell and upsell opportunities based on real purchasing behaviour.

But Here's What Makes us Different

We're Local

Unlike dealing with SugarCRM's offshore support, you get a dedicated Australian and New Zealand team who understands your market, your business challenges, and your time zone.

We Understand Your Entire Tech Stack

We don't just implement SugarCRM in isolation. We connect it with your ERP - creating a seamless ecosystem where all your customer data lives in one place.

Our Process: How we Make it Happen

With Optimate.me, you get:

- **Local Australian and New Zealand teams** who understand your market
- **Deep integration expertise** – we know how to connect SugarCRM with your existing tech ecosystem
- **Industry expertise** around customer experience, AI, and automation best practices
- **What's worth automating and what's not** – we've done this hundreds of times
- **Ongoing support** – we're here for the long haul, not just the initial sale

We're SugarCRM's **Elite Partner** for Australia & New Zealand, which means we have:

- Advanced certification and training
- Direct access to SugarCRM's product and engineering teams
- Early access to new features and capabilities
- Proven track record of successful implementations

Real Results: Companies that are Excelling with SugarCRM

When Fern Energy rebranded through the merger of Southfuels and Farmland Fuels, their business grew rapidly. Focused on end-to-end fuel solutions for customers from Kaitaia to Bluff, their growth and geographically diverse customer base required the need to gain granular visibility of customers with an easy-to-use CRM solution.

THE CHALLENGES

Fragmented Customer Information
Customer information was stored in multiple places, making it impossible to have a single view of the customer (i.e. customer info, quoting, pricing, etc) and their back end finance system wasn't able to support CRM functionality.

No Centralised Quote Tracking
The business has no easy way to track signed quotes and have them attributed to a sales opportunity. This was amplified by inconsistent quoting and pricing by each salesperson.

Customer Database was Maintained Manually
This meant there was inconsistent information being stored against each customer, data was messy, segmentation was near impossible and running effective digital marketing campaigns was very difficult.

Extremely High Call Volume to the Customer Service Team
The customer service team was getting nearly 300 calls per day. Over 60 of these calls were their own sales team not being able to find information they needed about a customer.

THE SOLUTION

Centralized CX Platform
A singular view of the customer, where all information is stored in one place, creating one source of truth. This is accessible both on a desktop as well as mobile version, making information easy to see whilst on the road making sales calls.

Integrated Quoting System
A fully integrated Quoting system, with built-in pricing module stored against each customer inside the CRM. This allowed sales staff to see customer quotes, use the built-in pricing module and track the status of that quote.

Automated Database Updates
No longer need to manually update their customer database. Once information is added against a customer from a sales team member, marketing staff or customer service that information is stored against the contact and visible from anyone on the team.

Instantly Available Information for Sales Teams Reducing In-house Queries
Focus on customer queries that matter. With nearly 20% of incoming calls previously made from the sales team, with SugarCRM now the sales team can view what they need in SugarCRM leaving the customer service team to focus on customer queries.

Why Companies Choose to Partner with Optimate.me

"My advice for anyone who is looking to implement a CRM in their business would be to find a really competent local partner, I think that's something that made our decision and our transition easy, we are still developing the system and optimate.me is really helping us to get the most out of it" Greer Marshall - Project Manager, TotalEnergies.

"Working with optimate.me was a no brainer. Optimate.me took the time to know our business, our challenges, our team and helped us to navigate and execute the changes. This meant we could continue to do what we do best, without disruption to our business and our customers." Crhis Gourley - National Sales Manager, Fern Energy

"Optimate.me has been critical in deploying SugarCRM with us, for the ongoing support of a CRM of this scale its important to have a good partner to work with on an ongoing basis" Shane R - National Sales Manager, Mimico

"Optimate.me configured SugarCRM in such a way that we can track a project and see who the Architect, Engineer and builder as well as a historical view of the other projects they have worked on, this information has become a critical part of our sales strategy" Alex Valentine - Managing Director, Allco Waterproofing

"Optimate.me has been an excellent partner both in terms of the initial deployment of SugarCRM and the ongoing development, they have a good mix of business acumen and technical capability, including local development resources"
*Nick Bray - Managing Director, Alchemy Agencies*

Next Steps

If you're interested in exploring how **Optimate.me** can transform your customer service operations, here's what happens next:

Book a 30-minute discovery call with our team

- We'll discuss your current customer service challenges
- Explore whether SugarCRM is the right fit for your business
- Provide a ballpark timeline and investment range

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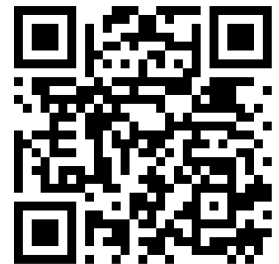
Ready to Transform Your Customer Service?

Book a discovery call: https://calendly.com/tom-optimate/30min
Email us: tom@optimate.me
Visit our website: www.optimate.me

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Optimate.me – We optimise, automate, and grow your business with best-of-breed software and bulls**t-free advice.

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