

FINANCIAL MANAGEMENT eREPORTING



Key Benefits

- Vital functions at your fingertips
- Save time, money and paper
- Tailor to your customer or supplier needs
- Automatic remittances
- Company preferences for email
- Faxing and PDF preferences
- Easily customise reporting



Greentree® eReporting

Every business looks for ways to save valuable time spent on repetitive yet essential administration tasks. At the push of a button Greentree's eReporting provides the flexibility and ease of use to automatically send reports and business documents to staff, customers and suppliers via email, print or fax.

Vital functions at your fingertips

eReporting provides the ability to automatically transmit invoices, statements, remittance advices and purchase orders to customers and suppliers from within Greentree via email, fax, or post. Each user has a variety of report formats to choose from such as Adobe® PDF, HTML, JPG and PNG based on their requirement.

Save time and money

With these powerful capabilities, eReporting will pay for itself within a very short space of time. Just add up the cost of postage, stationery and all that valuable staff time currently spent in preparing your monthly mailings. Using eReporting will considerably reduce these costs and staff time can then be allocated to better servicing your customers.

Greentree System Preferences

Password preferences VBA integration options RPS

Emailing preferences Faxing preferences PDF preferences

Mail server address: 192.163.1.1

Mail server port: 25

Client name: Bill Sawyer

Default reply address: info@greentree.com

Reply address level: System Preferences

Username: bilisa

Password: [REDACTED]

Default report format: PDF

NOTE: If no user name is specified then no authentication with the email server will be done.

Log SMTP traffic (for diagnostic purposes only)

Send a test email

Editing an existing System settings



"Very, very responsive!"



Tailored to your needs

Greentree's eReporting allows the automatic formatting, processing and delivery of business documents, including account receivable invoices and statements, accounts payable remittances, purchase orders and employee payslips.

Delivery is by the appropriate delivery format defined for each customer or supplier. Each delivery method can be assigned its own document layout giving you the flexibility to design the best looking layout per document.

Automatic remittances and statements

eReporting will dramatically reduce the time spent manually processing and printing invoices, monthly statements and remittance advices that are currently posted out to customers and suppliers.

Using eReporting, each individual trading partner can nominate which method they would prefer to receive

their invoice, statement or remittance advice by and the required details are then entered against each document type. On running the print process, each document is processed in the relevant way, email, print or fax queue for distribution.

Company preferences for email

To save time and to maintain company standards, Greentree allows system wide email and fax preferences to be specified. When reports are emailed to your customers or suppliers the system will use the preferred options, which means time is not wasted having to specify the criteria each time a report needs to be sent. Email preferences include mail server address, client name, reply email address, username and password and also the default report format.

Faxing preferences

eReporting allows faxes to be sent with a cover page outlining the sender's and receiver's details, the number of

"We were confident that Greentree was the ideal system for our requirements. The flexibility with reporting stood out. The level of useful management information we can now produce is fantastic."

*Joe O'Connell, Group Financial Controller
– H W Richardson Group Ltd*



Related Modules

- Accounts Receivable
- Accounts Payable
- Sales Orders
- Payroll
- Job Cost



pages sent and relevant comments. When faxes are sent these details are automatically filled in and the cover page is sent with the report.

Customised reporting

With Greentree's powerful Report Designer, any of the documents used for eReporting can be tailored to suit you and your trading partners business requirements providing flexibility to ensure that information provided is clear and specific.



CLIENT SPOTLIGHT: Acumen Republic



Acumen Republic Limited is New Zealand's pre-eminent public relations company specialising in all aspects of communication including strategy, political lobbying, media relations, investor relations, crisis management, internal communications, change management, advertising and marketing communications. It's the only public relations consultancy with advertising accreditation in New Zealand.

For more information visit: www.acumenrepublic.co.nz



"Very, very integrated!"



“Very, very integrated!”

Greentree is modular, with all business functions totally integrated. This provides you with a wide variety of modules and sub-modules that afford options rarely found in other packages. You purchase the pieces that you need, effectively matching the system to fit your business. Choose from: Financials, Job Costing, Supply Chain & Distribution, Manufacturing, Human Resources, Customer Relationship Management (CRM), Service & Asset Management, Business Intelligence, Retail, Workflow-Business Process Management and eBusiness.

Greentree is a **flexible** solution, readily adapting across a broad range of industries and business types. Businesses are provided with a **powerful**, extremely cost-effective system that has consistently proven itself capable of managing change and growing business potential.

With simple, smart thinking at your fingertips, Greentree provides the ultimate seamless business-building environment. Exploit its accuracy in business metrics, challenge its capability to deliver empowering information. Rely on the one highly **responsive** solution to efficiently streamline your internal processes resulting in increased manageability and productivity across all areas of your enterprise.

What’s the difference to any other software solution? Greentree is the most responsive business software product available, providing a source of competitive advantage to help you drive your business to the next level!

