PRONTO Xi

Applications Overview



Distribution

Inventory in motion

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Inventory in motion

Streamline your operations, better manage costs and gain a competitive advantage

Pronto Xi's Distribution gives you clear visibility of your inventory across warehouses, with all the detailed information you need to make informed business decisions.

Inventory moves in and out of businesses with the help of purchase and sales orders. Consisting of Inventory, Sales and Purchasing modules, Distribution helps you manage these essential elements of doing business with smart tools to move your stock to the right places at the right time with minimal costs.

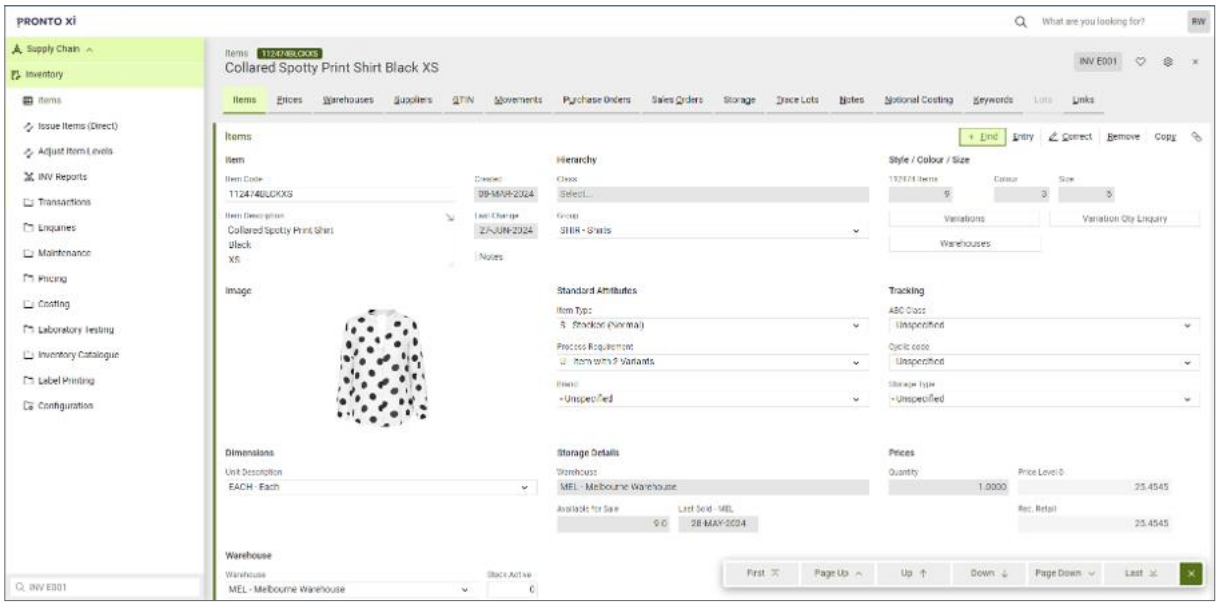
Applicable to any industry, Inventory tracks your stock at a granular level. Organise stock by quantity, movement, groups/kits and more. Store detailed and customised information about each item, including detailed price information, and automate ordering and replenishment functions. With information flowing seamlessly into the fully integrated General Ledger, you can be confident that your data is accurate and up to date.

Purchasing is an efficient procurement solution that provides tight cost control. It simplifies purchasing activities by managing domestic and foreign supplies and shipment processes. Automate the creation of purchase orders using rules based on inventory levels, sales order commitments and sales history, freeing up your procurement team to negotiate better deals. A unique approval system allows users to create simple or complex approval processes based on business needs in an easy-to-use workflow administration screen.

Manage the end-to-end sales order life cycle with Sales. A simple but powerful way to manage sales, it processes sales orders, produces picking slips, and prints consignment notes, manifests, labels and customer documentation — all within a single integrated solution. Any updates to sales orders are automated, and changes are instantly pushed across all relevant modules in Pronto Xi, ensuring seamless and error-free processes.

Inventory

Efficiently control your product flows with Inventory



Maintain detailed information about an inventory item

With seamless integration with Pronto Xi modules such as Purchasing and Manufacturing, and the ability to track stock by warehouse, Inventory gives you complete visibility over your business's inventory.

Key features include:

- multiple warehouses, suppliers and prices per item
- variant items: style, colour and size
- serial number and lot tracking
- multiple units of measure (UOM) and first-in, first-out (FIFO)
- support for Global Trade Item Number (GTIN) barcodes
- standard, average, FIFO, actual and replacement costings
- item licences
- stocktake and cycle counting
- interactive image display for products
- item attributes
- automated reordering and replenishment

Inventory master records

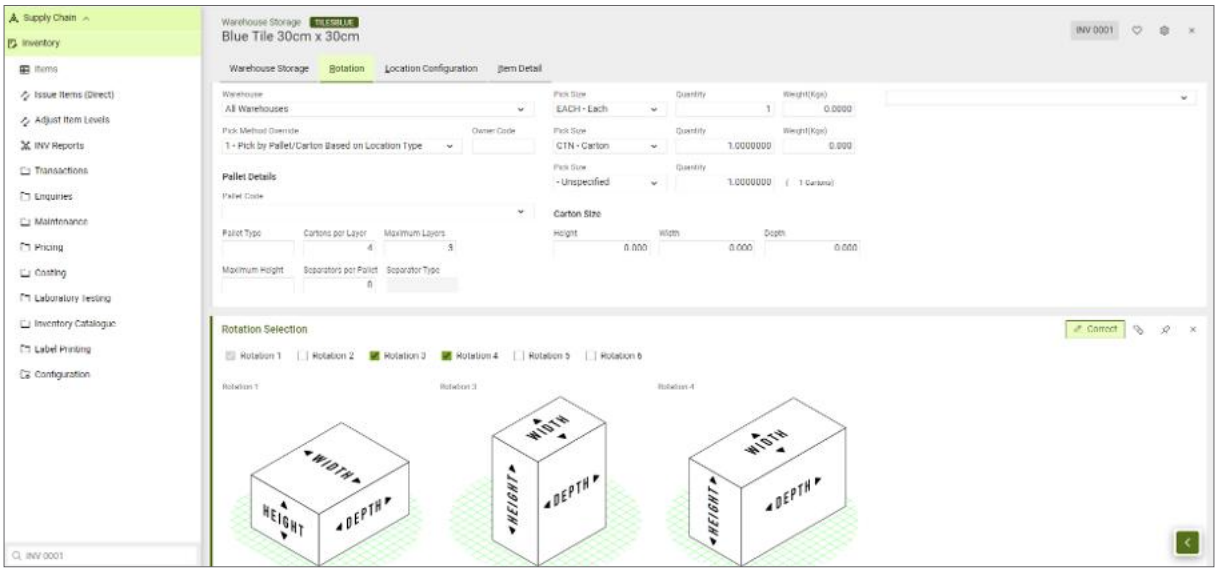
Inventory records the information and transaction history associated with an item. To create or maintain an item, use the main Items Maintenance screen.

We've introduced Item templates so you can maintain and manage industry-specific inventory information for industries such as chemical, paper, retail, wholesale distribution, timber and mining.

It handles the following types of items:

- **Stocked or standard** — A normal saleable item which is typically purchased but can also be manufactured
- **Manufactured** — Items with components, a bill of materials (BOM) and routings
- **Raw materials** — Items that are not saleable and do not have a BOM, but can be transferred using a transfer sales order
- **Indent** — Items that are not generally held in stock but are purchased subject to a sale
- **Kit** — A combination of various types of items
- **Labour** — Items that have a cost and a selling price but there is no necessity to control the quantity on hand (for example, items used as components to cost labour in a BOM or in kits)
- **Specials** — Items with a cost and a selling price, but because they are generally used to control cost overhead recovery or are consumables (for example, expense items such as stationery or electricity), there is no necessity to control the quantity on hand

Inventory master records can also include additional information or notes, such as hazardous or dangerous goods documentation.



Record the information of each inventory item with Inventory master records

Managing multiple processes

Inventory provides you with the flexibility to manage multiple processes for a single inventory item.

For example, you may have an item that needs to be configured as backflushed, in line with your manufacturing process, but also requires license controls. With Inventory's process requirement functionality, you can configure the required options in one easy step.

Inventory maintenance

The module's main Inventory Maintenance screen displays selected and relevant information based on your item type. If Inventory Maintenance includes a screen you don't need, create an item template to hide fields. The mode button at the top also provides access to additional screens for warehouses, suppliers, pricing, alternatives, notes, BOM and more.

Warehouses

Inventory tracking is available in the Warehouse Management System (WMS), but Inventory also allows you to maintain pick and bulk locations against each warehouse in the non-WMS environment.

The inventory warehouse information records and tracks movements, costs and commitments for each item in each warehouse, helping you to manage your reordering requirements.

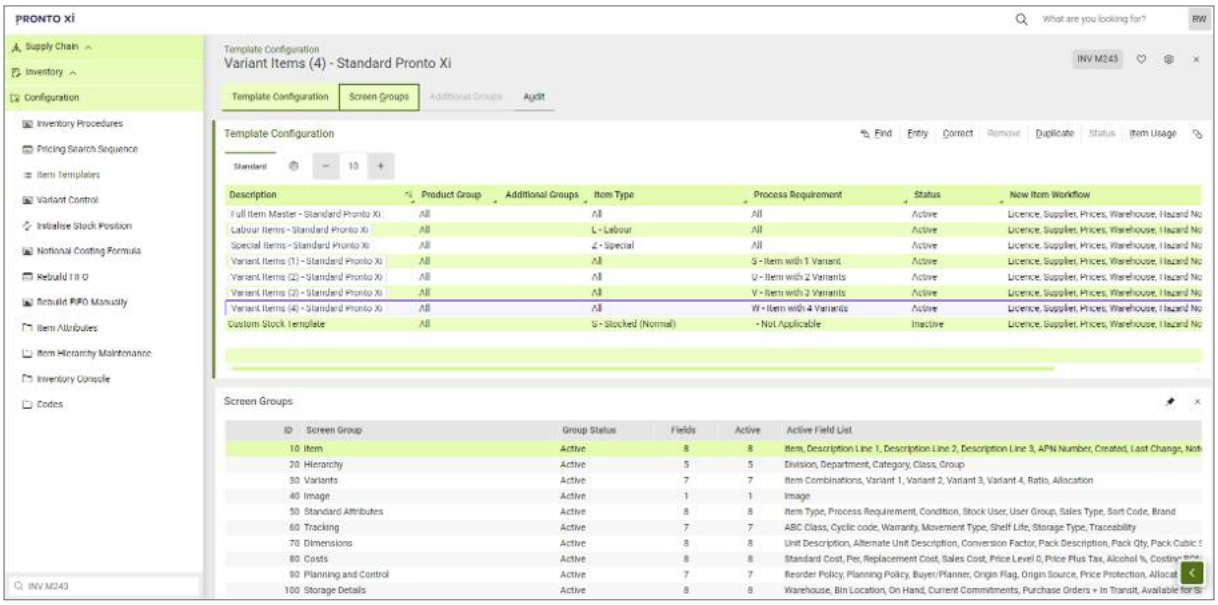
In addition, the Warehouses screen permits you to:

- determine inventory postings to the General Ledger
- record sales history
- automatically receive items from other warehouses via internal transfer orders

It accommodates various types of warehouses, including standard and advanced warehouses, factories, service vans (inventory stored in fleet vehicles) and consignments.

The screen also captures detailed inventory-level information for each warehouse, including stock on hand, supplier orders and order commitments.

Inventory movements in each warehouse are recorded, summarised and displayed by transaction type.



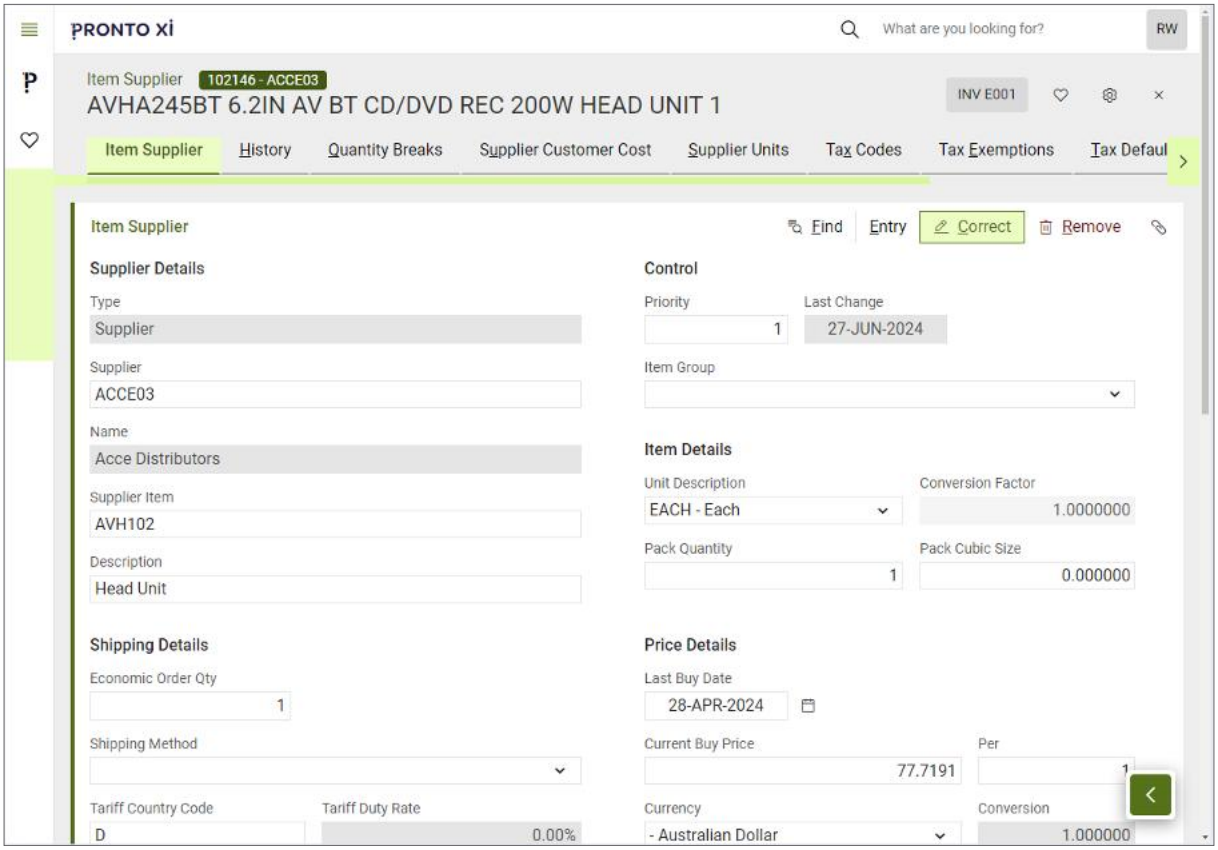
Hide fields that are not required within inventory maintenance

Suppliers

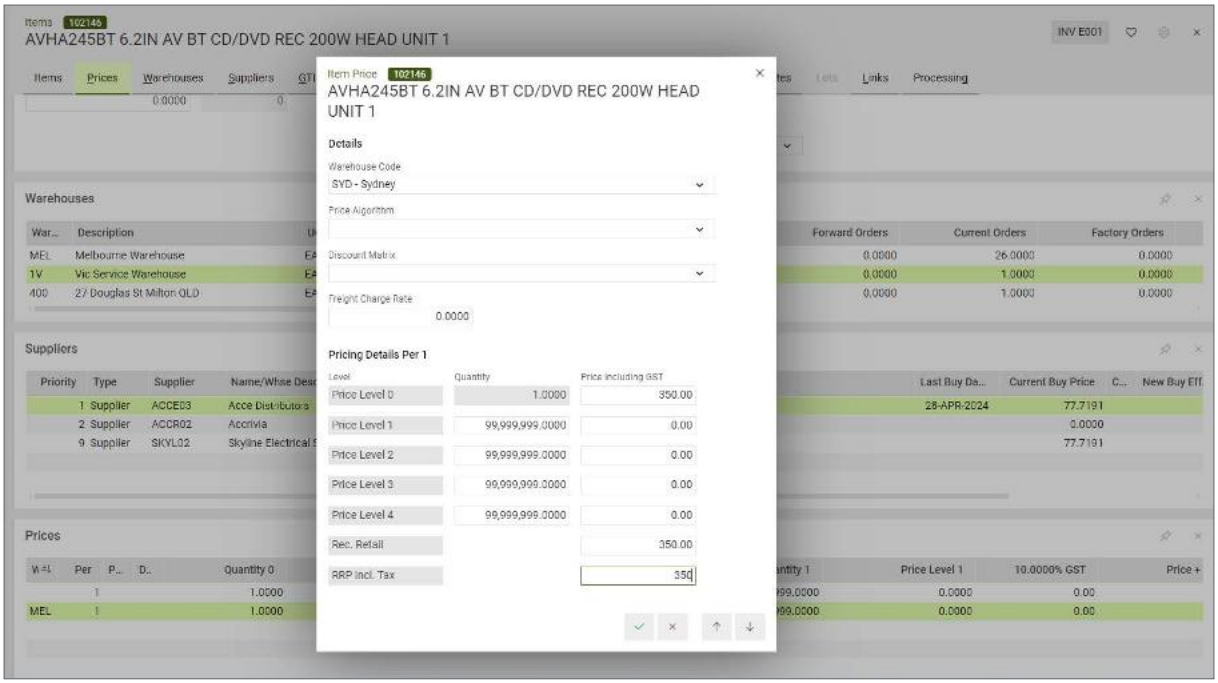
The Supplier screen allows you to set up a supplier for an item by region, record pertinent information and track performance levels. Specify any number of suppliers.

Supplier attributes include:

- supplier preference
- supplier item code, description and conversion factor
- minimum order quantity
- supplier item group
- pack quantity and volume for cost apportionment of freight charges
- supplier estimated and most recent lead time
- multiple quantity price breaks by supplier
- foreign currency pricing



iPad Air view on Inventory Supplier record



Manage flexible pricing, promotions, and competitor tracking with ease

Pricing

Inventory allows you to set pricing structures within the inventory master records. Maintain multiple pricing levels for each item, apply promotional prices for specified periods or set-up price algorithms and discount matrices. Tax rules are handled either at the item level or globally.

An item's basic pricing record consists of a base price, multiple prices for different categories or quantity breaks, and the recommended retail price. Each item may have additional pricing structures defined by customer group or Warehouse.

Recalculate item prices based on a mark-up value or by applying a percentage increase over current prices. Your current price list can also be copied into a price maintenance environment — where price changes can be manipulated — before you update the current price lists.

Inventory also allows you to keep track of competitor prices.

Inventory master fields

Inventory includes the following master fields for each item, giving you complete flexibility and control over how you handle the detail.

Item code

The item code is an alphanumeric field used to identify items in Pronto Xi.

Description

Each item includes a three-line product description. In addition, an extended notes facility allows you to store unlimited text for internal and external purposes.

Product hierarchy

The product hierarchy is a multi-level classification system that clearly defines your business's product classification.

The five-level structure has many benefits, including enhanced inventory management and reporting capability via Pronto Xi modules such as Business Intelligence.

You can select how many of the five "levels" of the hierarchy are turned on, and Inventory's flexible maintenance means the hierarchy can be maintained from the top down or bottom up, making it suitable for various business needs and industries.

Associated functions such as price maintenance, reordering and bulk item maintenance can leverage active hierarchy levels. Data integrity is maintained by enforcing the hierarchical relationships between each "child" and "parent".

Product group

Posting inventory transactions to the General Ledger is fully automated.

Categorise items by product groups, which is beneficial for:

- recording sales history
- posting to the General Ledger for sales, cost of goods sold and more
- reporting
- dissection of prices, discounts and promotions
- calculation of sales representative commissions
- inventory valuation

Establish prices, discounts and promotions based on product groups, for example, contract price by customer type/item group and promotional discount by customer type/item group. You can also establish special commission rates for sales representatives by product group.

Attributes

Item attributes help extend the description of a product through a structured and ordered categorisation. Importantly, use attributes as data points to "slice and dice" sales data and uncover customer buying habits and preferences. These insights can then be used to create sales promotions, forecast purchases and exchange data with Avenue and eCommerce platforms.

APN

An alternative part number (APN) for a specific item can be used to include the code of another item, which is cross-referenced when the first item is superseded.

GTIN

The universally recognised Global Trade Item Number (GTIN) is the industry-accepted barcode for a specific item. A single item can have multiple GTINs to reflect various units of measure, such as consumer unit, traded unit or pallet.

Use APN and GTIN for enquiry, reporting and scanning directly into Inventory.

Units, packs, sizes and weights

Apply multiple units of measure for the sale, warehouse storage and procurement of each inventory item. You can also store pack weights and cubic dimensions.

Traceability

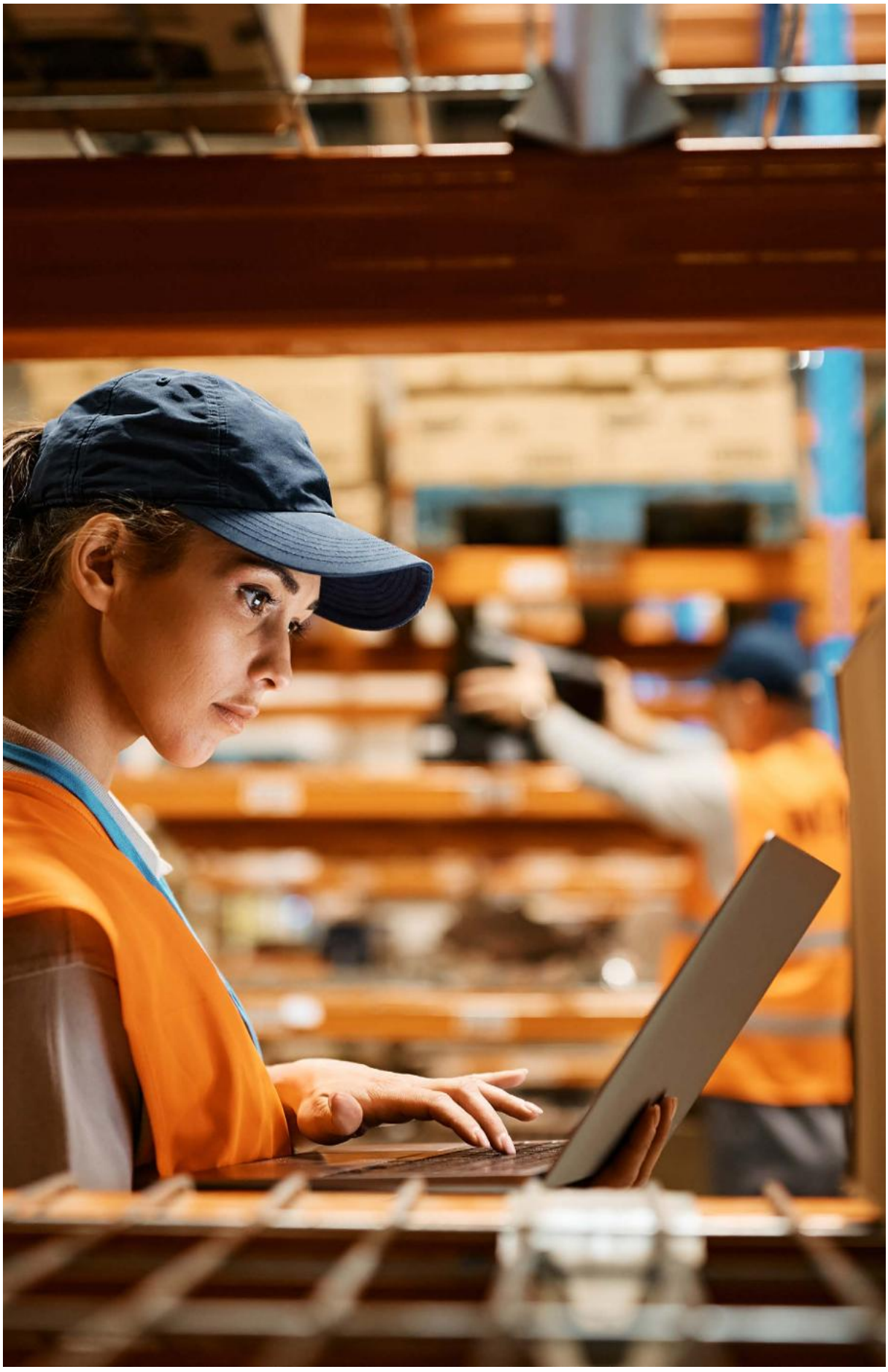
Inventory allows you to trace items using various methods, including:

- **Serial-tracked** — Used when the goods are received, at dispatch, or both
- **Lot-tracked** — Used for batch tracking, this facilitates full traceability from purchase to product recall, if required
- **Purchase-tracked** — Used for tracking by purchase order number

Import tariffs/excise tax

When an item is imported from a foreign supplier, the tariff charged depends on the supplier's country and the nature of the item.

Inventory uses a country code to identify the country of origin and a tariff code to identify the class of the item for tariff purposes. The country code is stored against the supplier, while the tariff code is held at the item level.



Inventory transactions

Inventory holds comprehensive transaction details for each item and warehouse, including control numbers (for example, serial or lot number), source documents and financial information.

You can also define the retention period for historical data files.

Inventory adjustments

Most inventory issues are captured within other Pronto Xi modules, such as Shopfloor Manufacturing or Sales. However, in some instances, you may need to record inventory issues manually.

Record issues against the following:

- Manufacturing (Factory/WIP or work order)
- Project (General Ledger or Service Call)
- General Ledger
- Maintenance
- Inventory Adjustment
- receipts from purchase order or work order

The manual recording of issues typically occurs within the Purchasing module. However, Inventory includes a fast and simple option — called Manufactured Goods Receipt — to receive goods purchased without using the BOM to create and process a formal work order.

A Manufactured Goods Receipt is a simple method of recording the receipt of manufactured items in an inventory. As goods allocated to a work order are sometimes returned unused, use this option to return the components back into inventory.

Quality analysis

Hold goods for release until they have passed through quality checks. If goods do not pass the checks, Inventory allows you to reject, scrap or return the items to the supplier.

Reorder processing

Inventory includes reordering functions, allowing you to automatically create purchase orders and work orders according to selected criteria and review these before creating the actual orders.

Reorder Reports calculates the reorder quantities needed to satisfy your business's commitments, minimum and maximum inventory levels, or a combination of these factors. You can also use average sales history, average warehouse demand or forecast to plan requirements.

The reorder processing calculation considers a number of factors, including:

- minimum and maximum days cover
- minimum and maximum inventory levels
- economic order quantity
- lead time
- current inventory level, including current commitments
- items on order from supplier
- in transit
- internal requisitions

Budgets

Inventory holds budget information at the item, planning group or item group level.

You can manually enter budgets for each period of the year. You can also use spread factors which include weightings or ratios to fix each period's relative proportion of the annual amount.

Pronto Xi also offers numerous reports comparing budgets against actual sales and cost listings.

Costing

Maintain various costs — such as standard, average, FIFO and actual — in Inventory for posting purposes, valuations and sales margin reporting.

Produce inventory valuation reports at any time using the costing method of your choice and, if necessary, recalculate costs based on a range of factors.

Landed costs are calculated as part of the shipment costing process in Accounts Payable.

Kits

Kits are a list of components made up of saleable items that can be optionally selected during the sales order process. For example, a computer, keyboard, monitor and mouse can be sold individually or as a kit.

Inventory accommodates various categories of kit component lines, including:

- mandatory
- optional
- variable quantity
- grouped options

Generate kit pricing from the components or simply select from the item price record.

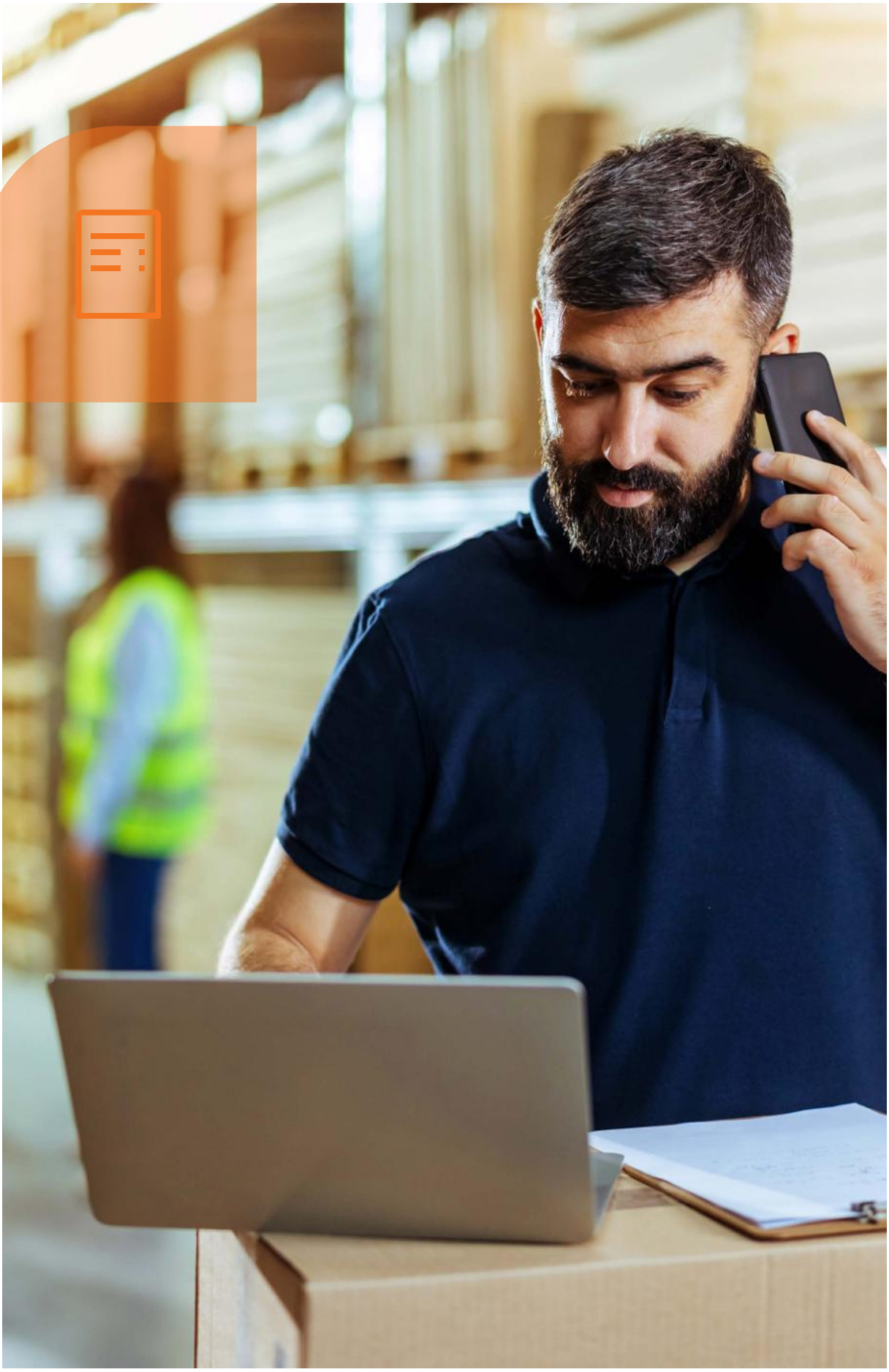
Stocktake

To help you measure your inventory accurately, Inventory generates a snapshot view of holdings. Any adjustments are automatically reflected in the General Ledger.

To ensure company policies are adhered to, Inventory supports wall-to-wall and cycle counting techniques, as well as data-capturing techniques such as tickets, barcodes, radio frequency (RF) and cards.

The stocktake process includes:

- **Initial pre-stocktake check** — Inventory reports on any outstanding inventory-related transactions that need completing prior to the book inventory's final snapshot
- **Prepare stocktake** — Inventory creates a snapshot file of your inventory holding and, if required, produces a Stocktake Report. A unique stocktake control code is generated as part of this process to facilitate easy identification and parameters
- **Stocktake refreeze** — Pronto Xi have the ability to refreeze the same stocktake file in the instance of an emergency order despatch
- **Enter counts** — Inventory employs multiple data-entry techniques, including manual data entry
- **Produce reports** — Inventory generates reports to assist with reconciliation, including uncounted items, variations and valuation reports
- **Update stocktake** — Inventory performs an update once the stocktake is finalised, and makes any necessary adjustments to the stock ledger and General Ledger for the appropriate accounting period



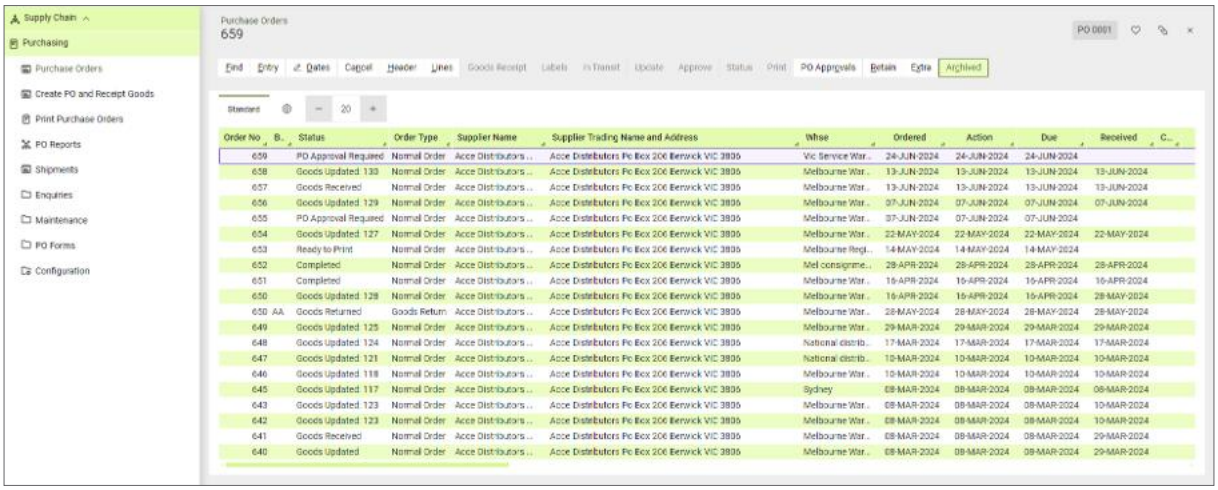
Purchasing

A highly efficient procurement solution, Purchasing manages today's supply and shipment processes — and tomorrow's future inventory requirements

Purchasing automatically creates purchase orders by combining data on inventory levels, sales history and current commitments. Purchase orders and shipment receipts automatically trigger updates to inventory levels, while invoices are matched and posted to the General Ledger.

Purchasing's functionality includes:

- integration with all Pronto Xi modules
- purchase authorisation limits
- internal requisitions
- tracking of orders through placement, dispatch, receipt and invoice
- goods receipt by order or shipment
- blanket and contract orders
- returns and quotation requests
- tracking of international shipment charges
- calculation of inventory costs from shipment charges
- allocation of costs by a variety of methods, including weight, value and volume
- automatic reordering
- multiple currencies
- multiple cost allocations per line
- shipment recosting
- centralised approvals
- nomination of approver
- reallocation of approvers
- workflow administration for approvals

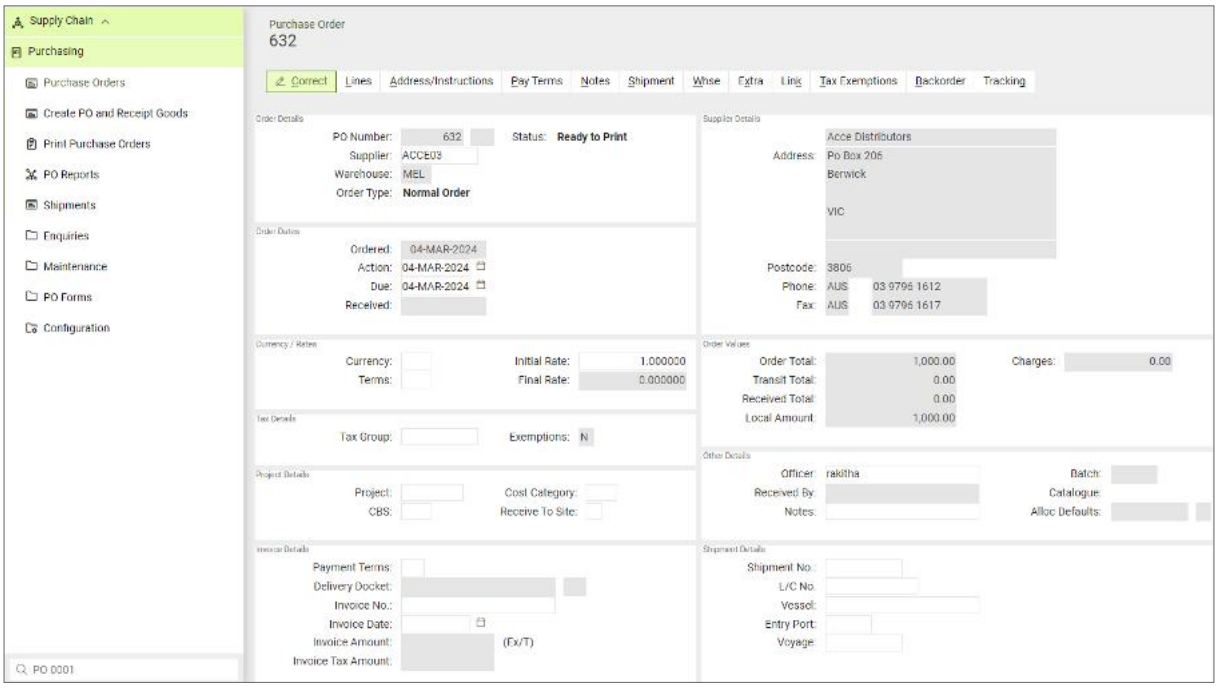


The Purchase Order management screen manages all purchases in one spot

Requisitions

Use Purchasing across the full range of functions associated with requisitions, including the approval process and enquiries.

It offers the capacity to raise a requisition before the entry of a purchase order and to ensure that an authorised person approves the requisition before a purchase order is raised.



Create comprehensive purchase order header details

Purchase orders

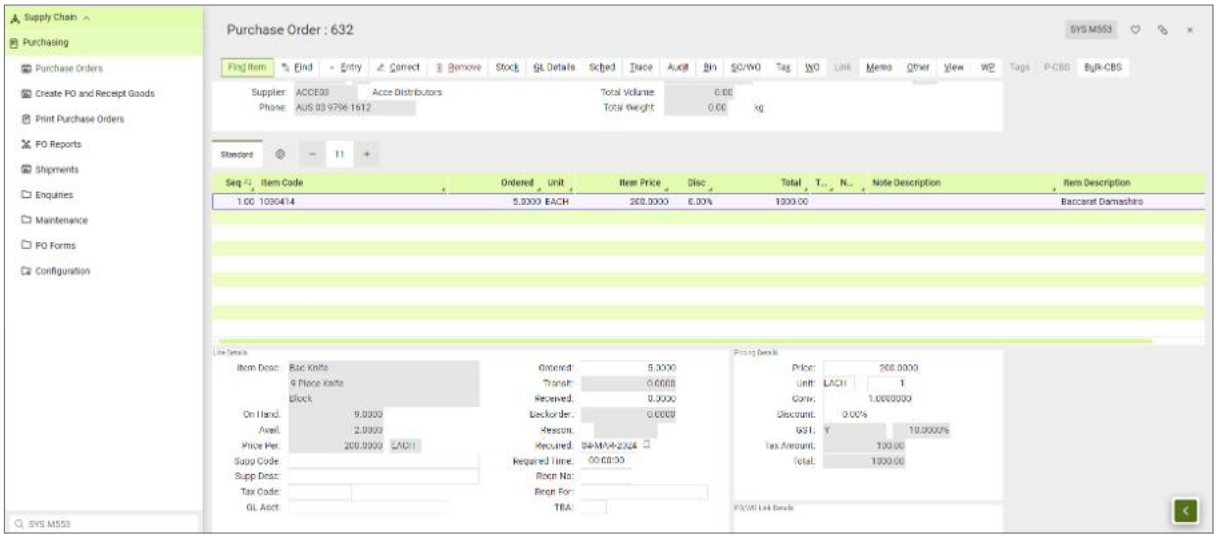
Pronto Xi automatically creates purchase orders, or the purchasing officer can follow a simple process to enter them manually. There is also the flexibility to configure these steps so they map to your business processes, ensuring efficient order entry.

Purchase order header

Purchasing automatically applies default parameters to the purchase order when a supplier is selected. And because it integrates with Accounts Payable, a rapid purchase order entry process is enabled without data duplication and errors.

Once an order is entered and approved, the order may be printed, and the inventory updated to show the quantity “on order”. Maintain purchase orders and record any changes, such as:

- multiple delivery docket numbers
- altered order status
- updated inventory levels and ledgers
- duplicate, break or split orders
- contract order variances
- returned items



View detailed information on all purchasing requirements

Purchase order lines

Within the Purchase Order Lines screen, you can access inventory enquiries, warehouse levels, pricing and available units of measure. You can also add notes, internal memos, additional charges and more.

Purchase order conclusion

Once all items are entered in the purchase order, they can be processed.

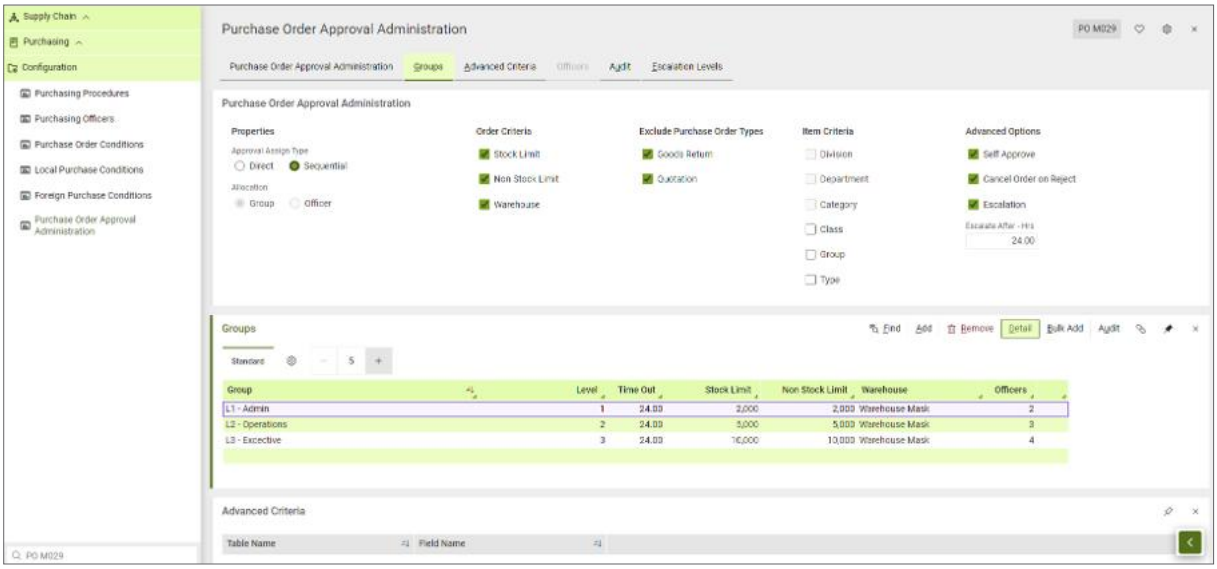
Purchase order approvals

Pronto Xi's purchase order approval workflow is built to support your business with multiple layers, advanced criteria sets and the ability to trigger approvals based on unique items being purchased.

Approvers can add commentary for the person requesting the approval, see audit history and have one central spot for all their approvals. The requester can see the progression of the approval process, view who the approval is currently with and add their own commentary.

There is also the ability to re-route the workflow if something requires urgent attention.

Purchase order approvals can occur via mobile phone. Pre-packaged alerts provide a one-touch response, taking approvers to the central purchase order approval workflow to action the request.



Use advanced criteria sets to tailor your business's purchase order approval workflow

Goods received by order

Once you enter and print a purchase order, you can record the receipt of goods. You also have the flexibility to process the invoice before or after receipt.

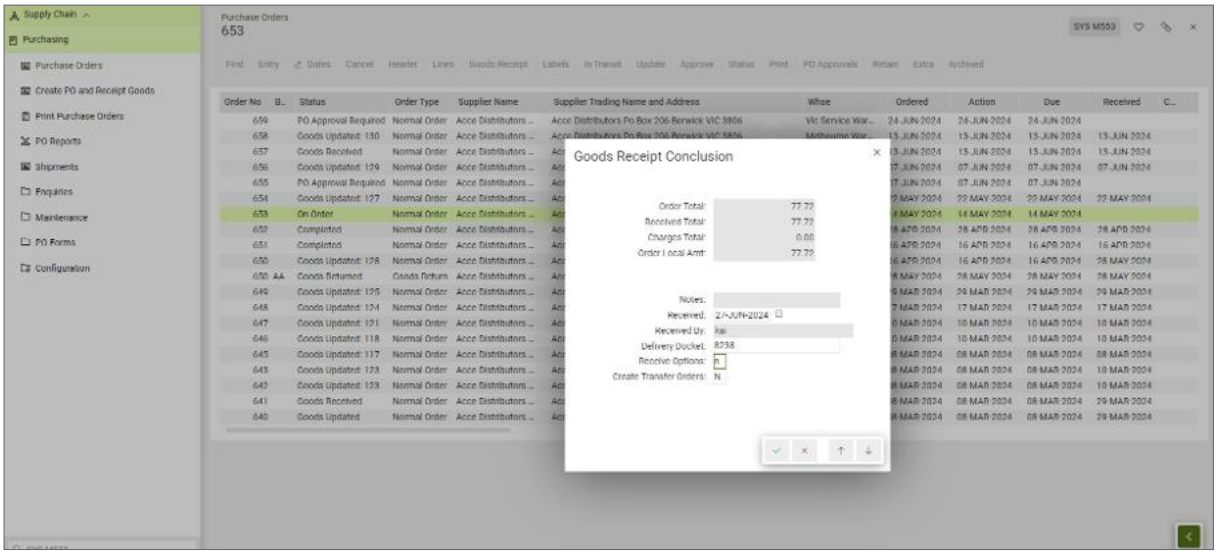
If you receive goods not on the original purchase order, you can add a new line to the order.

For first in, first out (FIFO) inventory management, Purchasing writes a FIFO record for each line item in the delivery.

If you receive only part of an order, the remainder is placed on backorder — these items are still considered on order and no additional processing is required. If you don't place the remainder on backorder, the system automatically cancels the undelivered items and adjust the order quantity accordingly.

Once goods are received, update the purchase order to allocate items to the destination warehouse. The received goods will be deducted from inventory on order or in transit (depending on order status) and added to the destination warehouse's inventory.

Purchasing also records the actual delivery dates to destination warehouses, as well as lead times.



Streamline goods receipt and inventory updates with flexible order management

Warranty orders/warranty exchange

Warranty orders result from warranty claims and link to a dealer/customer claim or a warranty workshop job number.

Load items and non-stocked lines onto a warranty purchase order and select the item(s) to return. If there is a financial claim, enter it on a special line to claim the amount.

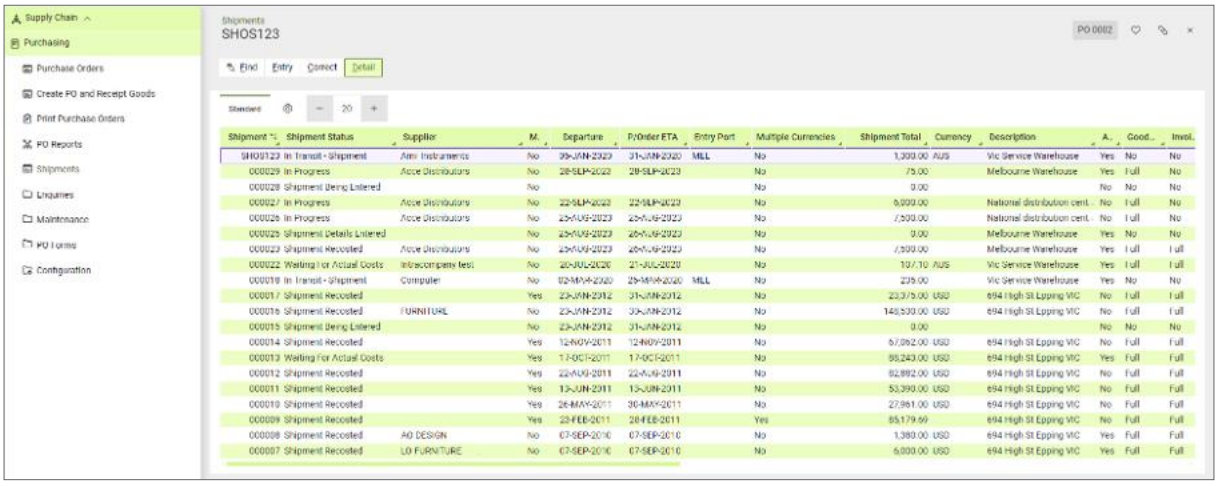
Shipment management

Purchasing includes an end-to-end shipment management capability, allowing you to group several orders against multiple international or local suppliers into one shipment and handle subsequent order processing, including delivery and invoicing, through the shipment processing functions.

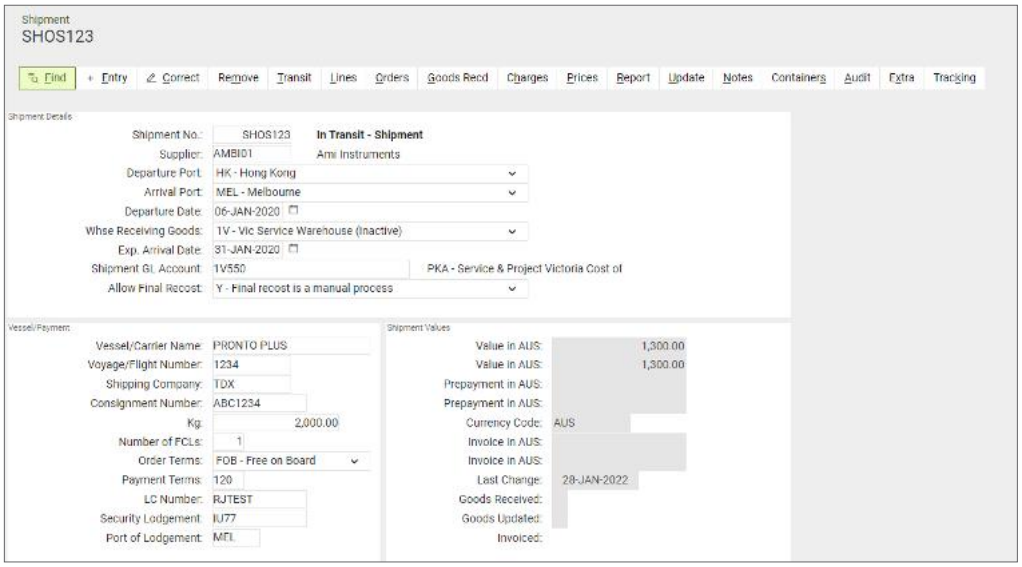
Use shipments to record dispatches of goods from suppliers. The shipment can include items from several purchase orders and can record freight or other associated costs. Using shipments lets you track the progress of the goods and calculate landed costs.

Purchasing supports standard, average, FIFO and actual costing techniques for foreign shipments. Charges incurred in the shipment are automatically recorded and incorporated into revised average and landed costs.

When you receive a shipment, the goods attached to it are booked into the destination warehouse.



Manage multi-order shipments, track progress, and calculate landed costs with ease



Find shipment information in a matter of seconds

Incoming shipment notifications

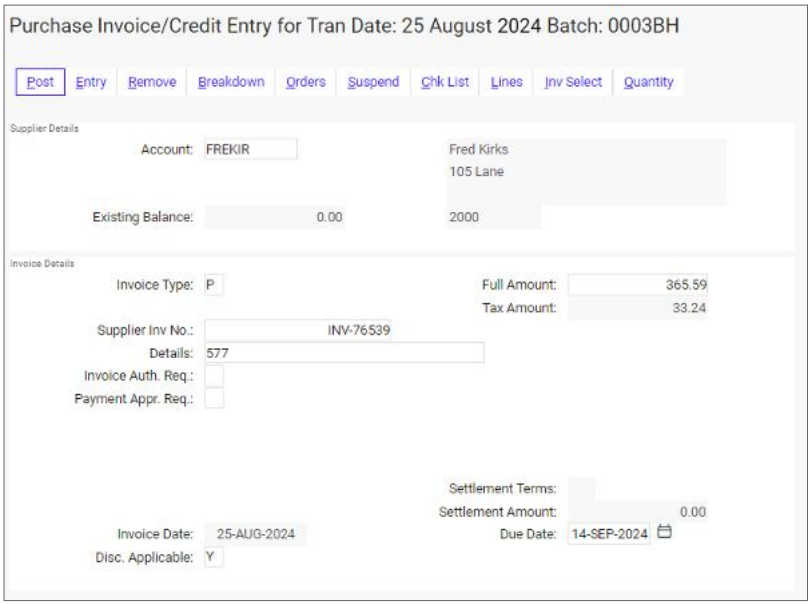
You can receive incoming goods data electronically before goods arrive, allowing you to efficiently plan your inwards goods operation. If you have an established electronic data interchange (EDI) trading relationship in Pronto Xi, this information will be sent via a supplier's EDI Dispatch Advice or Advanced Shipment Notification (ASN) message.

The ASN is also used to create or update purchase order shipment information in preparation for receiving goods into your warehouse.

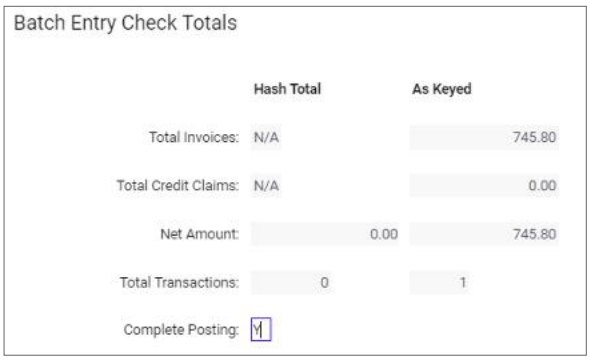
Invoicing

Accounts Payable posts purchase orders and shipment management invoices, which you can view by running a supplier enquiry and drilling down.

Pronto Xi provides sophisticated handling of purchase order invoice variances, including price, quantity or charge. Set tolerance limits to determine if you require payment approval and determine whether to apply the change to the goods or raise a credit claim.



Ensure the correct costing of inventory with an invoice-matching process



Check the totals for batch-entered orders

General Ledger integration

Transactions you create and enter through Purchasing automatically update to Pronto Xi's General Ledger and Accounts Payable modules according to the settings specified in Special Accounts.

Variance accounts, tariffs and duties

Purchasing allows you to record charges against a shipment associated with the goods being shipped. The duty payable is calculated from the duty rate and the purchase price of the item, so you don't need to enter it manually as a shipment charge.

Costing and recosting

Purchasing calculates the landed cost of an item at the goods receipt and recosting stages. It automatically spreads the value of all shipment charges across all items on the shipment based on the selected distribution method. A Shipment Costing Report detailing the apportionment is produced at this stage.

Flagging the shipment for final recosting allows you to book goods into inventory and sell them before final charges are known.

At the final recosting stage, Purchasing recalculates the new landed cost of the item and reevaluates the inventory on hand.

If the inventory has already been sold, Purchasing creates cost adjustment sales orders to reflect the correct cost for sales history reporting and performs the relevant postings to the Cost of Goods Sold accounts in the General Ledger.

Purchase orders and shipment enquiries

Purchasing's enquiry function lets you quickly find and retrieve detailed information on purchase orders and shipments in a number of different ways, including:

- order number
- warehouse
- status of order
- supplier
- item code
- requisition number

Supplier rebates

Set-up supplier rebates and enter them against purchase order invoices at invoice entry. The rebate amount is automatically calculated based on the invoice amount.

Supplier target-based rebates — where a quantity or amount is entered with a discount percentage for that target — can also be included. The discount percentage is not applied to an actual purchase order; instead, it is paid as a rebate by the supplier at a later date. The target applies to a period of time, and the discount applies when the cumulative purchases during that period exceed the target.

Enter actual rebates paid by the supplier; if you enter an amount greater than the rebate calculated, Purchasing issues a warning.



Sales

Sales order processes? Inventory and finance system integration? They've never been easier, thanks to Pronto Xi Sales

Sales is your go-to tool to simplify sales processes, helping you generate even more sales for your business.

It has numerous user-definable options to meet your specific requirements, and gives you the ability to tailor the entry screen and every stage within the order lifecycle process.

Whether you're dealing with large order volumes or highly configured product environments, scalable order entry solutions are a necessity. Sales' order templates and copy features deliver an optimised approach to order processing that empowers your sales team.

Manage every distribution aspect — from forward orders, quotations and consignments to warehouse transfers and returns — within simple, intuitive screens. Drill-back functionality and clear visibility of inventory and costs give you a 360-degree view across your distribution network.

Key features include:

- user-definable order entry screen
- bill of materials (BOM) configuration capability
- automatic inventory allocation
- internal transfer/work orders for unavailable inventory
- management of kits
- credit checking and display at order entry/edit
- multiple warehouse capabilities
- direct links between sales orders, purchase orders and work orders
- automatic freight calculations
- full sales history retention
- item alternatives and multiple units of measure
- full backorder management

Sales order integration

Sales fully integrates with Pronto Xi's Inventory, Accounts Receivable, General Ledger and Customer Relationship Management modules. When a sales order is updated, available inventory, customer data, sales history, inventory movements and relevant General Ledger accounts are automatically updated across Pronto Xi.

Where electronic data interchange (EDI) is required, Pronto Xi EDI delivers sales order automation when files are imported. You'll find automatic sales order creation in other modules, with Service, Rental and Project providing bulk creation processes based on agreed billing cycles.

Sales order entry and maintenance

Configure sales order entries to match your business processes and speed up order entries.

Sales order header

Once the customer is selected, the sales representative, price level, territory and available credit are automatically applied to a sales order. Integration with Accounts Receivable ensures a rapid sales order entry process without data duplication and errors.

Sales order lines

Upon entering items, the salesperson can view extensive inventory information, including pricing and availability. If an item is unavailable, Sales displays alternatives that might be of interest to the customer.

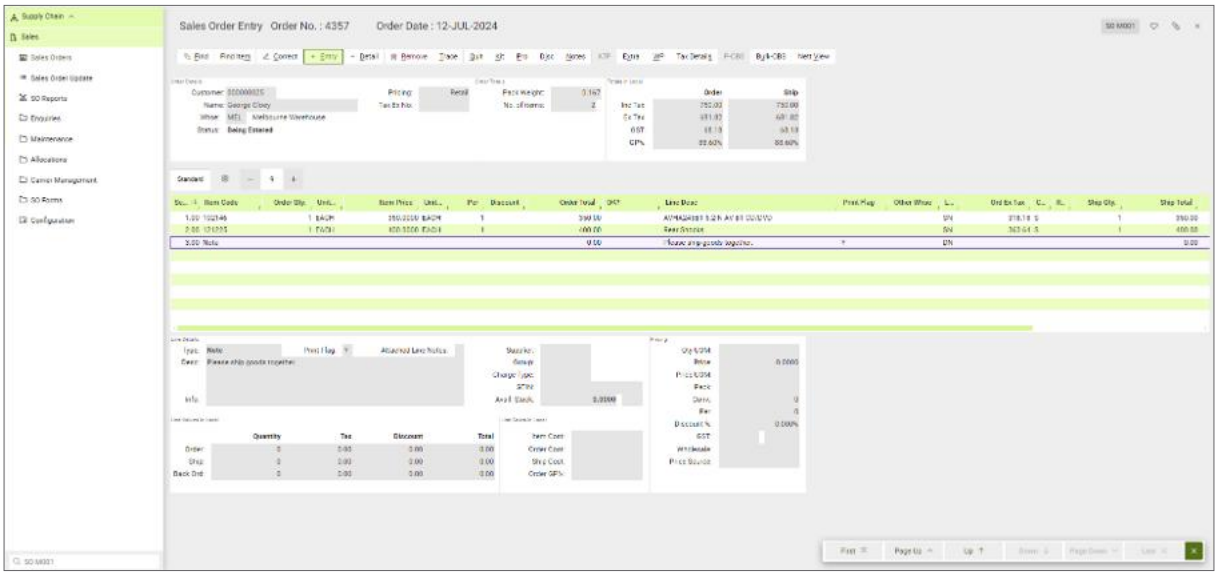
You can also record additional costs associated with fulfilment and charges for freight, packaging, handling or any other recoverable costs.

Sales order conclusion

Once all items are entered, Sales presents various options to process the order.

If the ordered items are available, the picking slip for this sales order is ready to be printed in the allocated warehouse.





Create and update sales order lines with detailed costs and stock information

Sales order types

For convenience and flexibility, Sales handles a range of different order types. The order type defines the underlying business process and includes the following:

Normal sales orders

Track the progress of a sales order by its status. For example, if an order status is "Work Order Created", the item is currently being manufactured.

If ordered goods are unavailable in the warehouse that typically dispatches to the customer, you can check if they are available from other warehouses. If yes, dispatch the items automatically or transfer them to the originating warehouse.

Pronto Xi also creates work orders or purchase orders directly linked to sales orders for unavailable items. Drill down from the sales order to track the progress of these items.

Credit notes

Extensive credit note facilities are available in Sales.

Raise a full or partial credit, which will automatically load the original invoice lines and prompt you to process the type of credit. The type of credit can apply to the entire order or line-by-line.

You can also set limits for raising and approving credit notes and give appropriate warnings.

Available credit types include:

- credit and recharge of inventory
- net price/discount credit and recharge
- return to inventory
- inventory write-off
- credit of a charge
- inventory exchange
- issue new item free

Transfers

Sales allows you to create a transfer order to properly control and document the sequence of events necessary to move stock between warehouses.

In addition, Sales produces picking slips and transfer documents, enabling you to control the movement of goods.

Quotations

Sales produces quotations where it's easy to manipulate pricing based on cost, mark-up and other criteria. Inventory remains uncommitted until the quotation becomes an order.

Configure quotations for customer-specific requirements. Any adjustments or reconfigurations made during negotiations automatically recalculate the quotation details.

You can also have quotations pass through an acceptance phase before they convert to an order. If the quotation is rejected, you can enter the reason for the lost sale. Reports allow you to track and analyse lost opportunities, assisting you in identifying trends.

Internal sales

Accept orders from within your organisation within Sales. The department requiring the product raises an internal requisition, which is treated as an internal sales order, helping you maintain accurate inventory tracking and manage possible freight charges.

Forward orders

You can enter an order with a future delivery date without immediately allocating stock otherwise available for immediate sale. Inventory isn't allocated to a forward order until closer to the supply date.

You can also schedule regular deliveries for a forward order — for example, if you need to supply a customer with a quantity of items on the first of every month.

Contracts

When a customer has a contract to purchase goods or services to a maximum value and quantity, record these details on a contract order. During order entry, Sales allows the contract number to be entered and ensures that the contracted details are applied.

Proformas

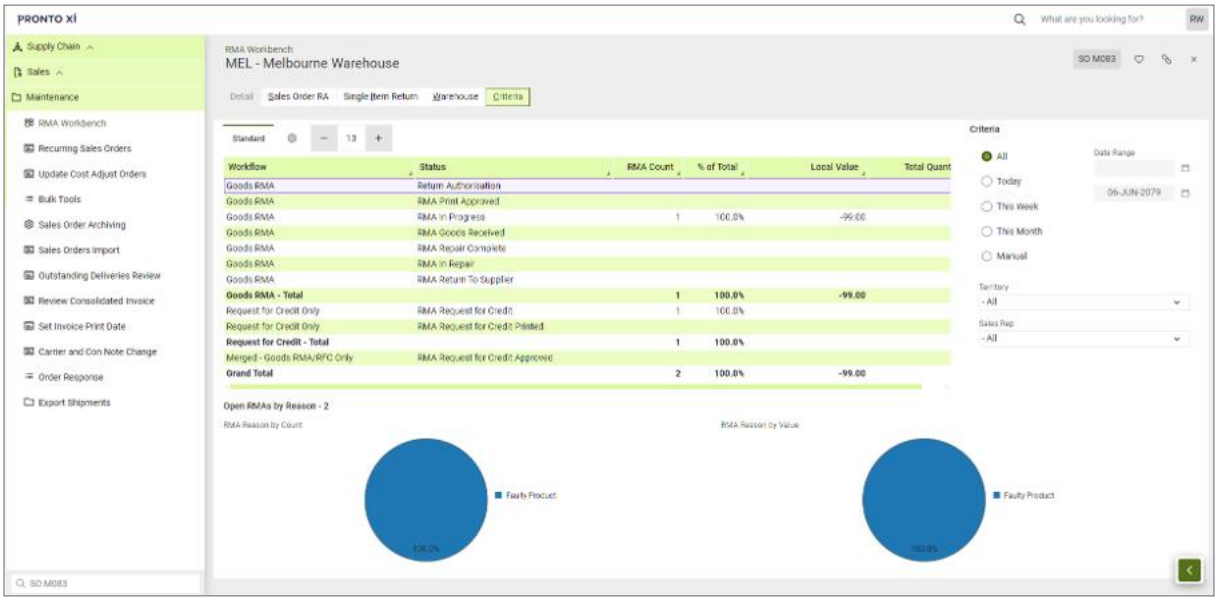
A proforma order is a standing customer order that lists typically purchased items. You can directly access the proforma and select items from it, helping to minimise the administrative effort associated with a new customer sales order entry.

Return authorisations

Sales enables you to manage and track the entire lifecycle of customer returns. Efficiently log return authorisations and control how items are returned to stock, written off or recharged and credited — all within a single screen.

The returns management process allows you to:

- create a product return request
- review and approve the return request
- confirm the arrival of goods back into the warehouse
- return goods to your supplier for credit, replacement or repair
- return goods to the warehouse for resale
- create a work order to have goods repaired, reworked or disassembled
- raise a full or partial credit note for your customer
- keep track of returned goods and report on the reasons for returns to assist in forecasting future requirements, addressing areas of concern and recording the supply chain's performance



Streamline customer returns from authorisation to restocking or credit in one screen

Split deliveries

Schedule a sales order as a split delivery so that it is fulfilled progressively over time — for example, by a certain quantity every week. You can also specify delivery dates and the number of items for each delivery.

Recurring sales orders

Automate the scheduling of recurring orders, reducing administrative time. This is particularly useful for transactions with a predefined supply of goods and services over a given period.

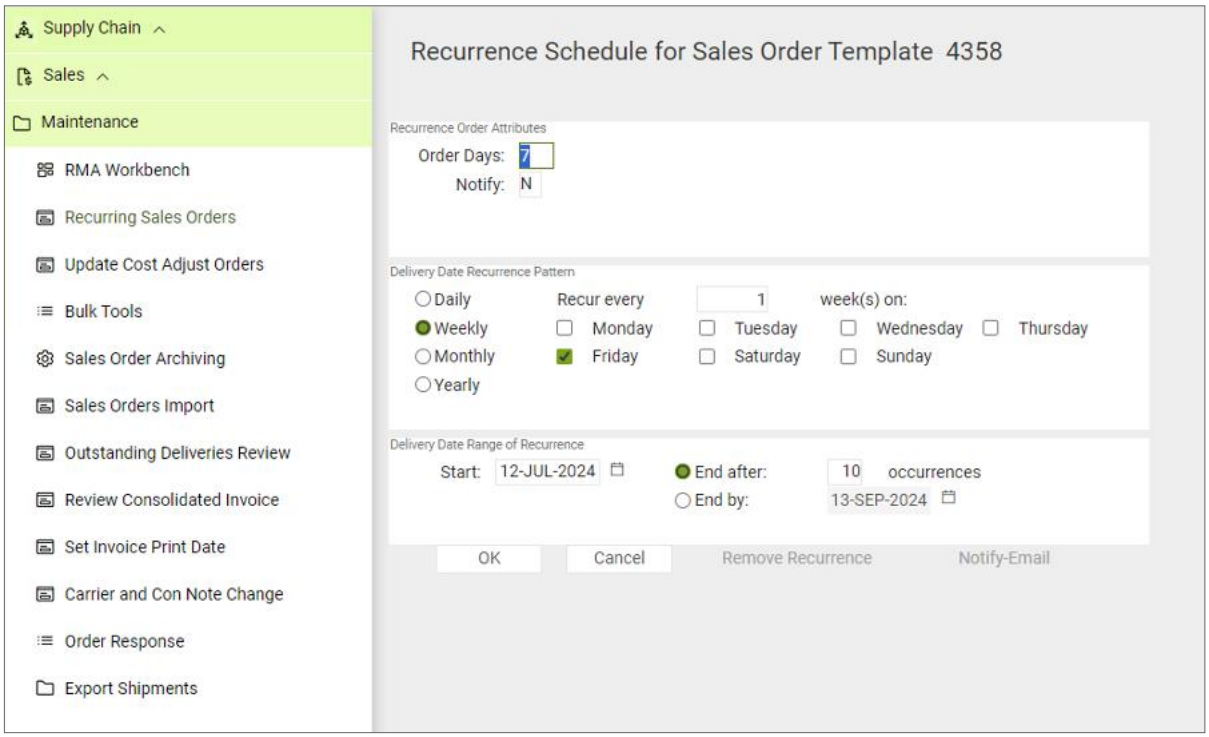
Create billing templates and define the frequency for each invoice. The agreed price of goods and services is set at the creation of the invoice and takes pricing fluctuations into account.

When new invoices or orders are created automatically, Sales' built-in notification system will alert you via email.

Credit control

Sales generates a warning if a customer is "on hold", or over their credit limit or terms. The order status is then set to "on hold" or "credit hold", depending on the circumstances.

Set-up a credit officer to receive an automatic email notification when orders are placed on hold. They can then decide whether to release the order for dispatch.



Automate recurring sales orders to save time and streamline invoicing with built-in notifications

Backorder/inventory allocation

You can view sales orders to check for current inventory commitments anytime. When there is insufficient inventory to satisfy a customer's order, several options are available, depending on the customer's nominated backorder and your part shipment policy.

Some of these options include:

- **No backorders allowed** — A backorder will not be created for any item not supplied on the original order
- **Part shipments disallowed** — The order is held for dispatch until all items are available
- **Backorders allowed** — The backorder is supplied when the next order is placed, which merges the backordered items with the following order
- **Part shipments allowed** — Available items are dispatched and the remaining items are placed on backorder

For tracking ease, when part of an order is placed on backorder, Sales refers to the original order to identify the backorder.

Perform inventory allocations manually or automatically based on the parameters set. Items can also be automatically allocated to backorders upon receipt of goods from a purchase order or shipment.

Sales budgets

You can set sales budgets in Pronto Xi's Sales, Accounts Receivable or Inventory modules based on customer, item code, territory or item group.

Apply a user-defined spread factor across the year or set budgets for each period. The spread factor can consider seasonal fluctuations, geographic differences or other elements that influence sales at various times.

Sales order enquiries

A range of sophisticated enquiry facilities enables you to find an order easily. Make enquiries by account code, product, customer reference, warehouse, user ID, invoice number, credit note number, status, order number, delivery or consignment note number.

Sales rebates

Depending on your specific requirements, Pronto Xi calculates rebates based on percentages, flat values or quantities.

Customer rebates

Calculate rebates for a variety of combinations, including customer code, customer group, item code, item group and item group class. Rebates can also be forwarded to the customer in a number of ways.

When a sale is made to a customer, the invoice program determines if any rebate is due on the sale. When a customer rebate is applicable, Pronto Xi updates the relevant sales history files and makes provisional postings to the General Ledger.

In addition, the program runs a report before preparing statements to calculate the rebate amount earned by the customer.

Manual customer rebates

Calculate rebates by customer and item code using a percentage rebate rate. The rebate is applied to the sales order line shipped amount (excluding tax).

Royalty rebates

Calculate royalty rebates by item using either a value or a percentage. The cost of the sales order line is updated to include the calculated rebate, which affects the sales history.

Sales order management

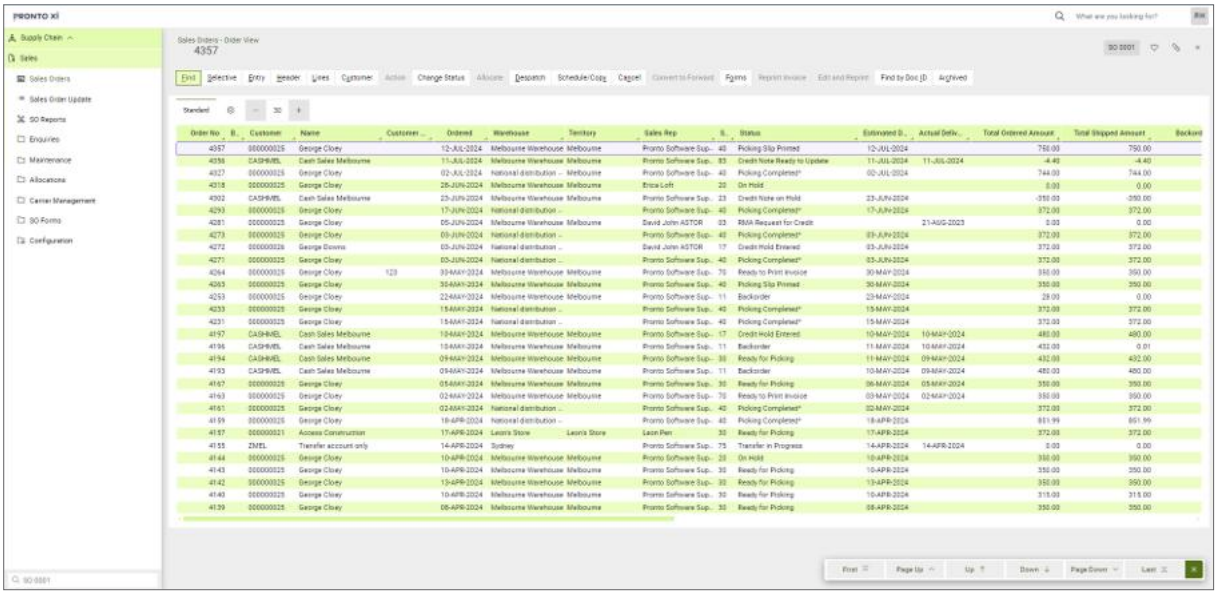
View of all your sales orders — with any status — on a single screen and gain significant efficiencies by having all the information in one place rather than navigating to separate enquiry screens based on order status. This is particularly useful if you manage large numbers of sales orders every day but do not use the Warehouse Management System (WMS).

Warranty

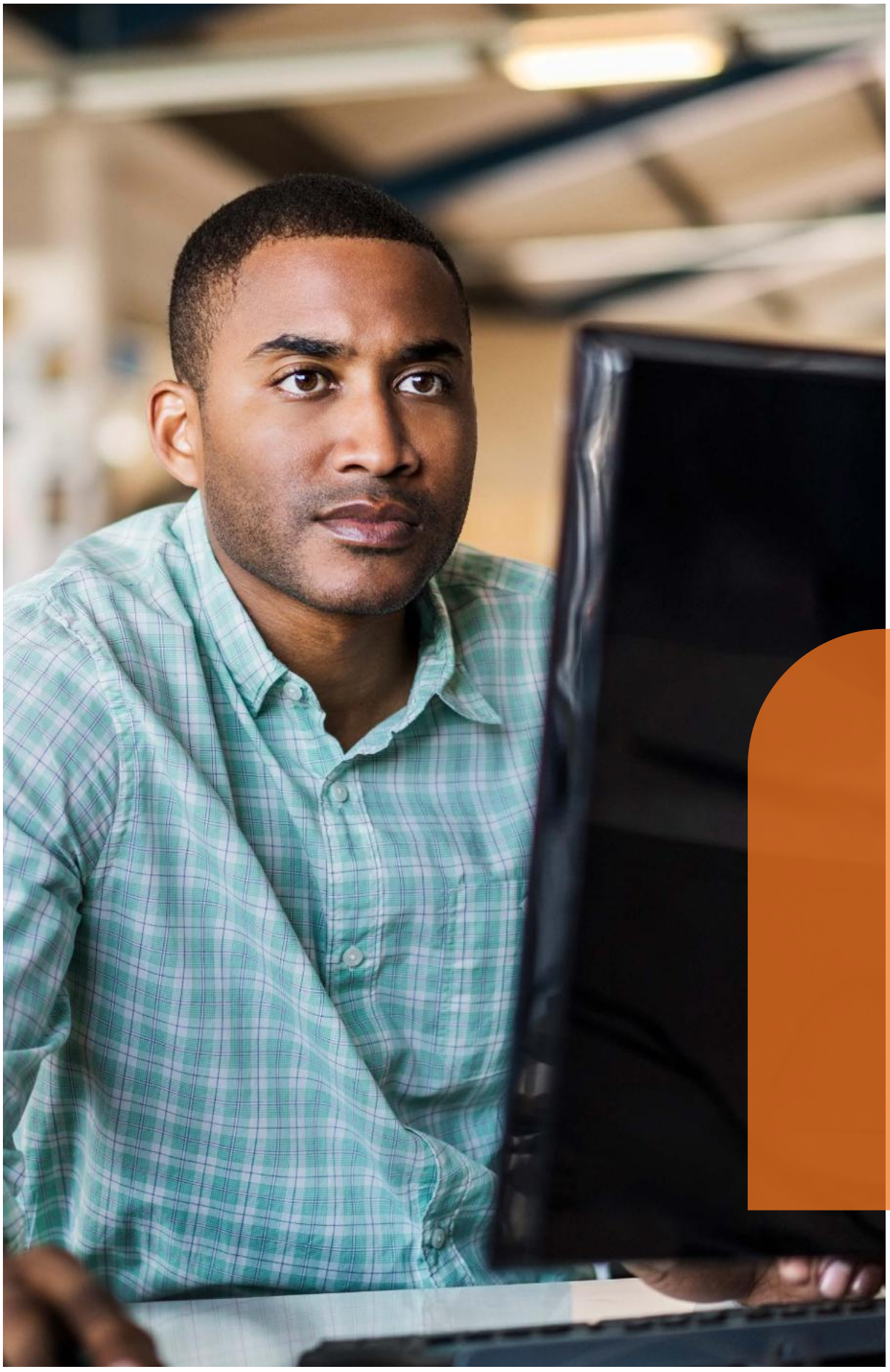
Quickly enter and track warranty claims and manage product returns with Warranty.

Warranty maintains notes, instructions and fault descriptions for the warranty work. In addition, you can:

- print invoice and consignment notes for the current job
- convert a quotation to an order
- view machine details for the current order
- raise, view or maintain purchase orders
- finish or cancel the current job



View all your sales orders, including their status and other details, on a single screen



About us

PRONTO SOFTWARE

We are an Australian developer of award winning business management and analytics solutions. Pronto Xi, our Enterprise Resource Planning (ERP) software, integrates accounting, operational and mobile features in a single system – optimising business processes and unlocking actionable insights. That's why for more than 45 years, over 1,500 Australian and global organisations, across a wide range of industries, have trusted Pronto Xi to simplify their most complex challenges.

With headquarters and our Development Centre located in Melbourne, we have support offices and consultants based across Australia, as well as a global network of Resellers and Solution Partners. Specialised business units within Pronto Software have the expertise to assist you with pivotal technology – Digital Transformation with Pronto Woven, Cloud and Hosting services with Pronto Cloud and Business Intelligence solutions with Pronto iQ.

When you choose Pronto Software, you gain a team with deep industry experience, giving us the ability to understand your specific needs and build innovative solutions that drive business growth and revenue.

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